



Accredited Investors

WEALTH MANAGEMENT

Operations Analyst

Accredited Investors Wealth Management® is currently seeking a motivated and curious individual with a problem-solving mindset to support the operations team within an industry-leading wealth management firm. The Operations Analyst will work directly with the operations team as well as other internal teams to identify efficiencies, implement solutions, and ensure exceptional productivity amid a culture of continuous improvement. A successful candidate is driven, collaborative, and a critical thinker committed to building a career with opportunities for growth.

Primary Responsibilities

- Collaborate and lead projects with various internal partners such as IT, business development, and wealth management directors to evaluate resources and improve productivity
- Support the Operations Manager on day-to-day business operations responsibilities such as new client onboarding and billing operations
- Work with department leaders to regularly review tools, processes, and organization-wide standard operating procedures and proactively identify project opportunities
- Partner with compliance department in maintaining and processing required books and records
- Assist Chief Compliance Officer with annual compliance reporting and testing
- Monitor business processes and perform routine audits to identify potential compliance risks
- Help implement new policies, systems or controls designed to reduce risk
- Evaluate current business policies and procedures to improve performance and efficiency
- Proactively keep updated on industry trends, solutions, and resources
- Other duties, as assigned

Required Knowledge, Skills and Abilities

- Ability to work successfully within the Accredited Investors culture while driving results – high personal and professional integrity
- Exceptional verbal, written, and interpersonal communication skills
- Excellent organizational and prioritization skills; proven to consistently follow-through
- Self-disciplined with commitment to quality, attention to detail and accuracy
- Creative problem solver, ability to anticipate others' needs
- Resourceful, with the ability to independently resolve questions and issues
- Personable and approachable with a positive attitude
- Open-minded and able to effectively evaluate various perspectives
- Flexible and adaptable in an environment of complexity and change
- Motivated, collaborative, and committed to providing a superior work product
- Desire for continuous learning and development
- Ability to receive and provide feedback in an effective way

Experience

- 2+ years of project management or operations experience
- Strong proficiency with Microsoft Office, including Word, Excel, Outlook, and PowerPoint

Experience Accredited

Accredited Investors Wealth Management®, based in Edina, Minnesota, is a fee-only comprehensive Wealth Management firm. We serve high net worth clients using an individualized service model. Our clients value our strong level of attention to detail, responsiveness to their needs and professional style.

As a firm, in addition to serving our clients, we are engaged in community outreach and various green initiatives. Our employees enjoy a beautifully appointed facility, including a fitness center, state-of-the-art technology, and amenities that enhance our work environment. Our Service From Anywhere (SFA) policy provides team members with the flexibility to incorporate remote work into their schedules, while maintaining our dedication to serving Accredited's clients. Development and training of our firm's talent is a top priority.

Accredited Investors Wealth Management® offers a competitive compensation and benefits package including medical; dental; disability coverage; a 401k plan with a generous employer match; life insurance; a marketplace-leading time-off allowance, including paid parental leave and paid volunteer time; and firm-wide profit sharing. Accredited was named one of the Top 150 Workplaces in Minnesota by the Star Tribune in 2020.

Accredited is committed to promoting diversity and inclusion in our hiring process and is proud to be an equal opportunity employer. We welcome qualified applicants without regard to race, color, religion, sex (including pregnancy, sexual orientation and gender identity or expression), national origin, genetics, disability, age, veteran status, and any other characteristic protected by federal, state or local laws.

For more information about our firm, please visit our website at accredited.com.

Please direct your cover letter and resume with salary requirements to resumes@accredited.com.