



## Grant Street Asset Management: Operations Associate

### **Why Work for Grant Street Asset Management?**

- Grant Street is a 2<sup>nd</sup> generation employee-owned independent registered investment advisor. We have been working with families, business owners, physicians' groups and not-for-profit institutions as fiduciaries for 29 years.
- We manage over \$600 million in assets and have clients across the United States. Our headquarters is in Pittsburgh, PA (Southpointe office park in Canonsburg). A second office is located in Charlotte, NC.
- Our vision is to be our clients' most trusted and relied upon resource for all their financial needs.
- Our vision for our team is to hire, retain and grow the best professionals in the business in a culture of teamwork, friendship, hard work, respect and accountability.
- Firm is embarking on a growth trajectory and transitioning with a 2nd generation ownership team. Significant opportunity for advancement exists for the right candidate.
- Attractive healthcare benefits and profit-sharing plan available for all employees. Advisors also eligible for revenue sharing plan for new assets brought to the firm.
- Hybrid work schedule is available.

### **Job Summary:**

The responsibility of this position is managing specialized work efficiently, with confidence and competence. The position requires above average attention to details, concern for the exact correctness of work, and strong commitment to tasks completed on time. A successful candidate in this position will take work seriously, have a strong sense of duty, and be disciplined. A somewhat faster-than-average pace will be the norm for this position. Detailed, specialized work is the major focus.

The person in this position will likely require clearly defined work, responsibilities, and reporting relationships, ongoing and thorough training opportunities to develop expertise and increase confidence, and frequently expressed appreciation of the person's competence, conscientiousness, and loyalty. When changes in the nature of the work occur, the person in this position may require direction, training and support. The position will generally be task oriented, requiring someone with a conservative, careful, and cautious approach to work.

### **Job Duties and Requirements:**

- Operations Associate will support the operations team and be responsible for:
  - assisting in the maintenance of portfolio and client systems (Tamarac Advisor View & CRM)
  - preparing and distributing client reports
  - processing client paperwork and requests for money transfers.



- Workflows will rely heavily on use of technology and software systems. Proficiency in Microsoft Office Suite (word, excel, outlook) is required. Prior use of Tamarac Advisor View/CRM suite of products desirable. Applicant must be comfortable and capable to quickly learn new software systems.

**Professional Skills/Attributes Required:**

- Minimum 2 years of prior investment operations experience is desirable, and a basic understanding of investments is necessary.
- Applicant should be very detail oriented, highly organized, good at follow-up, and comfortable following procedural workflows.
- Applicant should work well within a team environment and be able to prioritize tasks across a number of assignments at once.
- Communication with clients demands strong verbal and written communications skills. Correct grammar and punctuation skills as well as prompt and professional follow-up are required.