

## Operations Specialist

The Operations Specialist position offers a unique opportunity for a highly motivated and detail-oriented individual to join Confluence Investment Management, an established investment management firm in Webster Groves, Missouri. The position will provide a chance to learn the responsibilities within the firm's operations area, which manages the day-to-day work flows for all active accounts and relationships – from account openings and daily cash flows to billing and performance reporting. Our hope is for the employee to seek additional responsibilities and advancement within the department and firm as experience and knowledge are gained over time.

The qualified candidate will be completing tasks that require the collection, organization, and analysis of information on a daily, weekly, monthly, and quarterly basis. These duties and responsibilities would include:

- Reviewing reports that analyze the composition and set up of accounts to identify outliers
- Preparing spreadsheets and reports for dissemination and review by multiple teams, including Operations and Trading
- Processing requests by financial advisors and custodians on behalf of clients for incepting and maintaining accounts
- Scanning and indexing documents per regulatory procedures
- Responding to internal and external requests in a timely fashion with all pertinent data included
- Working on individual projects and deadlines within a larger group to meet department goals
- Improving the department and firm by taking ownership of processes, identifying ways to enhance current procedures, and advising management of potential problems and solutions
- Maintaining quality service in all situations with a professional demeanor

The preferred qualifications for this position are:

- A bachelor's degree in Business or a minimum of two years of professional experience
- Experience with Microsoft Office products with a high degree of comfort using Excel
- Prior experience in a customer service-oriented position

The position will report directly to the Operations Manager and work alongside members of the Operations and Trading teams to create an environment that promotes collaboration and growth. This will be an on-site position. No travel is required.

Confluence Investment Management is an independent Registered Investment Adviser that provides professional portfolio management and advisory services to institutional and individual clients. The investment teams at Confluence specialize in asset allocation, domestic value equities, international equities, and alternative investment portfolio management. As of March 31, 2022, Confluence had more than \$12.0 billion in assets under management and advisement.

**For further information, contact:**

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