Operations Specialist
Financial Planning Fort Collins
375 E. Horsetooth Rd
Bldg. 3. Ste. 203
Fort Collins, CO 80525

About This Position

Our newest role is for an A-player who will focus on both operations as well as client-facing administrative duties in a highly collaborative, dynamic environment.

- Do what you enjoy and enjoy what you do in our lifestyle enterprise.
- Our local office is available to you but is not your required workspace.
- Work from anywhere and find work-life balance at our modern financial planning practice.
- Be or become our internal operations expert.

About Our Firm

Financial Planning Fort Collins is 100% employee-owned. We're full-time fiduciaries who excel at working with successful women and couples as well as individuals serving as trustees. With over 30 years of combined experience in financial planning, tax preparation, and investment management, our CERTIFIED FINANCIAL PLANNER™ pros are ready to help you excel in your career.

Role and Responsibilities

As a small team, we all wear many hats. Each member of the team will contribute to “onstage” client-facing activities as well as “backstage” administrative responsibilities.

- Support our team to keep us working at a high level by owning our internal operations and processes.
- Engage with clients directly for operations-related inquiries to help us provide a consistently superior client experience.
- Direct communications and planning-related questions from our clients via calls, emails, and texts to our CFP® pros.
- Be our go-to digital paperwork pro.

- Manage our cloud-based file system.
- Update our Client Service Manual to keep up with and document our ever-improving client service process.
- Coordinate with other professional service providers for the benefit of our clients and our processes.
- Other duties as required.

Qualifications, Education, Skills

The following competencies are not required but will give you a head start in our vetting process.

- 3+ years' experience in a personal finance-related position with operations responsibilities
- Bachelor's degree
- Self-driven and self-starting
- Customer service experience
- Strong interpersonal communication skills (verbal and written)
- Highly proficient technology skills
- Ability to remain discreet and keep private information private
- Ability to adjust to changing priorities, get back on track after frequent interruptions, and stick to deadlines
- Corny joke appreciation and/or tolerance

Our Tech Stack

You will use the following apps and tools, and we will train the right individual as needed. Bonus points if you're already familiar with any of the stuff below!

- Adobe Acrobat, Betterment for Advisors, Charles Schwab, DocuSign, Google Workspace, Laserapp, OnceHub, Orion, QuickBooks Online, RightCapital, RingCentral, Riskalyze, Salesforce, ShareFile, TD Ameritrade Veo One, and Zoom.

Compensation

This is a full-time salaried (W-2) position eligible for our listed benefits.

Annual Salary

- $45,000 - $55,000 *plus* quarterly bonus of up to 20%

Benefits

- 401(k) with 100% match up to 5%
- Health, Dental, and Vision insurance
    - In our small group plan, FPFoCo covers 50% of premiums for employees and 33% for spouse or domestic partner and/or dependant(s)

    - Health savings account (HSA) contributions through payroll deduction also available
- Short- and long-term disability insurance
    - Available through NAPFA as a member employee
- Life insurance
    - Available through NAPFA as a member employee
- Paid holidays
- Unlimited paid time off
- Employee ownership program (you get an ownership grant on day one)
- MacBook Pro + AirPods Pro
- Professional certification/education reimbursement (up to 100% of costs)
- Professional development: Love networking and attending industry events? We'll send you to up to two conferences in the contiguous U.S. each year (all expenses paid)

To apply, send your cover letter/video and resume to us at hello@fpfoco.com. We are currently accepting applications for this position.