

Manager of Operations – Job Description

Operations Manager

Certis Capital Management, an innovative financial strategy firm working with wealthy families, continues to expand. Our company culture is characterized by a fun, open atmosphere with a team-oriented culture. Benefits include competitive salary plus bonus, and health coverage. Our commitment is to help clients manage wealth, and transfer values to the next generation.

We are currently seeking an **Operations Manager** who possesses a proven track record in transforming and streamlining financial, legal, and accounting work-flows, filing, and record keeping; managing accounts receivable / payable and bookkeeping; interacting in a positive and professional manner with our clients and affiliates; and facilitating overall communications and operation of our business. The Operations Manager will report to the CEO.

Responsibilities

- General office administration
- Organize and maintain filing system for both hard copy and digital records
- Facilitation of client record keeping
- Scheduling of meetings and conference calls
- Answering phones and taking messages
- Bookkeeping and bill paying
- Managing firm bank accounts, reconciliation
- Significant client interaction

Qualifications

- Ability to participate as a key member of the team in a dynamic fast-paced environment.
- Must be an excellent communicator and have the ability to present to audiences in a clear and effective manner. Outstanding communication, presentation, and writing skills.
- Ability to develop proposals, status reports, and analysis in an articulate and professional manner.
- The successful candidate must reside in the Santa Barbara, CA area or be willing to relocate.
- BA or BS degree in Finance, Accounting, or the equivalent

To learn more or apply, please email inquiry@certiscapital.com.