Job Description
Operations Associate
November 2017

Opportunity Overview

The role is designed to increase operational capacity and tackle technology projects to streamline processes for our growing firm.

Responsibilities and Duties

- Apply Salesforce administrator skills to improve processes and workflows.
- Apply Excel skills to streamline business and financial planning processes.
- Work with current technology vendors to improve team experience, training, and utilization.
- Screen new technology vendors and drive the process of selection and implementation for those that would improve efficiency cost effectively.
- Provide extra support for core operations team roles during peak times including administrative duties and client service.
- Identify new ideas to improve team efficiency.

Skills & Attitudes Required

- Proven Salesforce administrator skills including workflow and process builder. Specific experience with Orchestrate's Process Composer is a plus.
- Advanced Excel skills.
- Strong general computer skills including Word and Outlook.
- Outstanding logical and analytical abilities for problem solving.
- Project management capabilities and experience.
- Experience selecting and working with technology vendors.
- Friendly, confident, sincere approach to interpersonal relationships.
- Solid written and verbal communication skills.
- Accuracy, speed, and attention to detail for record keeping and working with client data.
- Highest level of ethical responsibility and respect for client privacy.
- Quick learning skills for multiple technology and financial tools.
- Desire and ability to work independently and as part of a team.

About Keener Financial Planning

Keener Financial Planning is a fee-only financial planning and registered investment advisory firm with a primary office in Keller, TX and a satellite office in Dallas. As members of the Garrett Planning Network and NAPFA, our mission is to provide objective, expert financial advice tailored to each client's unique situation. Services range from a la carte financial advice on an hourly or flat-fee basis to comprehensive financial planning and investment management.

We have a fun, supportive work environment. But it's not easy. We work really hard to deliver an extremely high quality, consistent financial planning experience for each client. We served about 260 client households last year with a team of 6 people so we have multiple deadlines and deliverables every single week.

We are a growing firm. We want to continue providing highly personalized service while scaling our business model with efficient processes, smart use of technology, and extraordinary people.

Associate Position Details

We are searching for the right person to join our firm at our office in Keller. We want someone smart, happy, and hard-working, eager to make a difference. We envision this role to be full time, but are open to discussing other options for the right person. Compensation is open to discussion based on skills and experience. The ideal candidate will be interested in growth within the company and taking on additional responsibilities as our firm grows.

All employees are eligible for the 401k with company matching. After 90 days, employees are also eligible for open paid vacation time and paid holidays. Full time employees are eligible for company paid health, dental, vision, and life insurance.

How to Apply

Send your resume and a cover letter to jean@keenerfinancial.com. Please use PDF or Microsoft Word format.