

Job Title:

Operations Coordinator (Financial Services Market)

Location:

Remote (U.S. based) | Part-Time or Flexible

About Us:

We're a fast-growing company on a mission to help financial advisors attract ideal clients and establish trust faster with a proprietary, science-backed assessment tool. This innovative resource helps advisors spark meaningful conversations, deepen relationships, and stand out in a crowded marketplace.

Role Overview:

The Operations Coordinator plays a pivotal role in supporting the organization's day-to-day operations and client experience. This position serves as a key link between internal teams and external clients, ensuring smooth processes, accurate recordkeeping, and timely follow-through across multiple touchpoints.

The ideal candidate will bring strong organizational, communication, and problem-solving skills to manage a variety of operational and administrative responsibilities. Core areas of focus include client relations, CRM data maintenance, document management, process coordination, and onboarding support.

Key Responsibilities:

- Support client relations by serving as a point of contact for inquiries, and ongoing needs.
- Manage and maintain client data within the CRM system, ensuring accuracy, completeness, and timely updates.
- Assist with the organization and execution of client onboarding, including documentation, setup, and follow-up communication.
- Coordinate document management processes, including file organization, version control, and secure storage.

- Support operational reporting, data entry, and process tracking to ensure workflow efficiency and accountability.
- Collaborate with internal team to maintain smooth operational coordination.
- Contribute to continuous process improvement initiatives and operational documentation.

Ideal Profile:

- Highly organized with a strong attention to detail and accuracy.
- Excellent communication and interpersonal skills.
- Comfortable managing multiple projects and deadlines.
- Proficient in CRM platforms, document management software, and Microsoft Office/Google Workspace tools

Bonus Points For:

- Familiarity with CRM platforms like Monday.com or Salesforce
- Background in the financial services industry

What We Offer:

- Competitive base salary
- Remote work in a team environment Ongoing training, coaching and mentorship
- Mission-driven culture focused on innovation, connection, and trust