



## **Operations Generalist**

Cobblestone Capital Advisors, LLC is a privately-owned, Rochester-based, SEC registered, investment advisor offering comprehensive investment advisory and wealth management services. The firm manages over \$2.6 billion in assets and has experienced steady growth since its founding in 1986.

### **Job Summary**

We are seeking an enthusiastic candidate to join our firm as an Operations Generalist. This entry-level role will be an integral part of the firm, as the Operations Generalist will be responsible for supporting team members across the entire organization as well as providing the highest quality of service to our clients. The Operations Generalist will cross-train with various departments to be ready to assist with not only day-to-day tasks but ongoing special projects.

### **Duties and Responsibilities**

- Support client teams in the execution of client-related work – CSA, Planning, Private Investments, etc.
- Ensure that all client needs and requests are handled promptly, accurately, and professionally
- Learn and become able to interface independently with our primary portfolio accounting and CRM systems
- Maintain customer relationship management (CRM) system and ensure accuracy of Tasks, Cases, and Records
- Maintain and administer all aspects of the quarterly reporting process
- Perform administrative duties: filing, mailing, scanning, photocopying, binding, faxing, stocking supplies, etc.
- Work as part of a team to answer phone lines and ensure calls are routed to proper person
- Communicate and collaborate with team members regarding accounts and processes
- Provide back-up support across various departments when needed
- Provide primary back-up support for the Receptionist and front desk responsibilities
- Learn and assist with back-office Ops tasks including but not limited to: proxy voting, claim litigation, account reconciliation, and billing
- Become an expert in our CRM system to assist with firm wide process development and training
- Continue to develop technical knowledge and expertise
- Identify and evaluate daily workflows for process improvement opportunities and work with others to enact change
- Perform other job-related duties or special projects as assigned

### **Qualifications**

- Bachelor's degree
- Confident and friendly professional demeanor
- Excellent communication and organizational skills
- Solid computer skills including capacity to learn new programs quickly
- Strong proficiency with Microsoft Office suite especially Excel, Word, PowerPoint
- Ability to excel in a team-oriented environment
- Salesforce knowledge a plus or the ability to become proficient quickly
- Systems and process-oriented mindset
- Ability to manage time effectively, set priorities and meet deadlines



- Strong attention to detail; a high degree of accuracy is required
- Ability to learn and adapt to change
- Willingness to seek out new learning opportunities to increase your effectiveness in your assigned position

### **Compensation and Benefits**

- Pay/Benefits are competitive based on industry standards and experience; the anticipated base salary range is \$40,000 to \$50,000 but may be adjusted commensurate with candidate experience and qualifications.
- Performance Bonus
- Benefits include health care, paid vacation, 401(K)

Interested candidates should apply here:

[https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&cclid=19000101\\_000001&jobid=496415&source=CC2&lang=en\\_US](https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&cclid=19000101_000001&jobid=496415&source=CC2&lang=en_US)

No phone calls, please.

We are an Equal Opportunity Employer and our company's policies and practices relating to recruitment, employment, career development and advancement, promotion and retirement are based solely on merit, without regard to all legally protected classes, including but not limited to: race, color, sex, age, disability, religion, citizenship or immigration status, national origin, ancestry, military status or veteran status, marital status, familial status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law.