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# Example of GWIM Senior Operations Representative Job Description

Our growing company is hiring for a GWIM senior operations representative. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for GWIM senior operations representative

* Risk mitigation by supporting the accuracy of security data attributes in the Managed Account portfolio trading platforms
* Provides relationship management for roughly 650 Domestic and Offshore Mutual Funds and Alternative Investment Fund Companies
* Hosts approximately 30 Fund Company Service Reviews and visits throughout the year in addition to the Annual Global Funds Conference
* Provides subject knowledge expertise to branch offices on the Merrill Lynch Monthly and Tax Reporting statements through reconciliations, hold-outs, statement content, and cost basis research
* Support email boxes
* Partner with multiple departments for client centric solutions
* Primarily responsible for operational processes, primarily document review, related to brokerage accounts, features and services
* Consistently meet expectations for performance metrics and quality standards
* Assist with resource content review and updates
* May provide assistance with training for new hire associates

## Qualifications for GWIM senior operations representative

* Must be comfortable in an environment with a heavy focus on exceptional service and accuracy
* At least a 2-year or 4-year college degree
* Knowledge of PACE and Image/FIRST is preferred
* 3-5 Hours Investing in You completed
* Cashiering/Teller background
* Must be able to work independently, excellent decision making skills, work for accuracy and must be able to meet deadlines