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# Example of Wealth Management Operations Job Description

Our company is growing rapidly and is looking for a wealth management operations. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for wealth management operations

* Oversee Fee Accuracy for Advisory Accounts
* Work directly with IT and other CG counterparts with the testing of new system enhancements and the implementation of new policies the lead for multiple processes at the same time, and provide support for ad hoc requests
* Vendor Invoice Processing
* Vendor Application entitlement reviews
* Ensure accurate and timely submission of year-end Form 1042-S and 1099
* Managing the contracting / trade confirmation / foreign settlement team/ local settlement team
* Ensure all trade confirmations are sent to clients on a timely basis and is accurate
* Ensure all trade settlements are timely and accurate
* Review and check daily exception reports
* Ensure accurate and timely creation of contracts / amendments

## Qualifications for wealth management operations

* Candidates must have flexibility in work hours - contact center hours are 7 days/week 24X7
* 3-5 year background in Operations specifically geared to Advisory Operations, Retirements, and or Mutual Funds Processing
* Candidate must have strong oral and communication skills and experience in analytical and organizational skills
* Unclaimed property experience not required, but recommended
* College graduate or minimal 5 years mutual fund experience
* Knowledge of Mutual Fund and 529 Plan processing