

Sales & Operations Project Manager

WealthVest Marketing—based in Bozeman, MT, and San Francisco, CA—is a financial services marketing and distribution firm specializing in high-quality fixed and fixed index annuities from many high quality insurance companies. For the 10,000+ baby boomers who are retiring daily, retirement is top of mind. Americans have purchased \$24.2 trillion in retirement assets to insure their golden years, according to the ICI. WealthVest specializes in the marketing and distribution of these essential building blocks of retirement savings for financial professionals and their clients across the nation. As a member of our team, you will be empowered to be innovative, solutions-oriented and a driver of a culture of continuous improvement. Our goal is to enable you to reach your professional goals and be an integral part of a team of people driving to achieve departmental and overall organizational goals.

Operations department team members work in a high-energy, fast-paced environment providing efficient, accurate and professional support and service to our wholesalers, agents, carriers, other partners and co-workers. The environment we operate in requires every member of our team to be problem-solvers, finding solutions when those solutions may not be easy to see. It also requires each team member to learn and grow, to help your co-workers learn and grow and to continually refine our systems and processes to make our department more efficient and effective. We pride ourselves on not only thinking on behalf of ourselves and WealthVest, but for our customers and carriers. Our team focuses on and communicates what can happen versus what can't happen. These standards are critical to achieving our individual, team and organizational goals to deliver best-in-class service.

Job Purpose/Role:

This position is responsible for executing partner onboarding, offboarding and changes, managing operations team projects, executing sales operations duties and assisting Program Manager position. Partner onboarding, offboarding and changes involve working with said partner and internal key stakeholders across the organization to execute all steps of the process managing the efficiency and accuracy of the process. Duties will include working with President and Sales Managers to draft agreements, ensure prospective partners meet compliance requirements and work with IT to control access to systems. Partners include external sales members, agencies, affiliated field marketing organizations, carriers, and broker dealers. In managing operations team projects, this position will work across the operations department to plan, manage and execute annual projects. Sales operations duties include ensuring all systems updates are executed and appropriate stakeholders are informed. This position will also be responsible for working with the Project Manager to implement corporate projects across the organization.

Key Requirements, Skills & Experience

- Exceptional critical thinking, problem solving and decision-making abilities
- Motivated and professional with strong work ethic, positive attitude and ability to work with demanding partners
- Strong verbal and written communication and interpersonal skills
- Strong attention to detail and exceptional organizational, task and meeting management skills
- Ability to work in a fast-paced environment and manage several tasks simultaneously within deadlines
- Strong project leadership skills, including ability to inspire others, set the vision and lead effectively
- Proactive and adaptable to new/unforeseen situations
- College degree required
- 5+ years working experience; 2+ years of operations, project management or equivalent required
- Strong working knowledge of PCs, Microsoft Office products (Word, Excel, Outlook)