

About Allodium:

Allodium provides comprehensive wealth and fiduciary management services to help individuals, families and small organizations achieve their investment goals and simplify their financial lives. We launched Allodium to provide the very best financial advice and personal service to a limited number of clients mostly in the Twin Cities area. We believe the best advice is objective and aligned with our clients' best interests – without potential conflicts of interest. To this end, Allodium is a fee-only Registered Investment Advisor (RIA) that is independent from banks, brokerage firms, investment custodians, mutual fund companies and other financial service providers.

To learn more about Allodium, please visit our website at www.allodium.com.

Job Purpose:

Generalist role to help our firm grow and prosper by assisting with a variety of operational, technology, client service and administrative efforts.

Responsibilities:

1) Operations and Compliance - (50%):

- Assist Operations and Compliance departments with variety of related activities.
- Independently manage and execute variety of operational and compliance projects.
- Help maintain professional and well organized office environment to leave a positive impression with visitors.
- Help update and test firm documents like compliance manual, data security plan and business continuity plan.
- Maintain procedures related to compliance and operations, and keep firm procedure index up to date.
- Execute quarterly billing process to obtain advisory fees from client accounts.
- Administer accounts payables program to ensure vendors receive prompt payment for their work.
- Help administer HR program and related benefits.
- Order supplies for the office and maintain inventories.

2) Technology - (25%):

- Serve as primary contact for IT support vendor, and troubleshoot and resolve technology/equipment issues.
- Evaluate new technologies and equipment to improve our business via independent research and RFPs.
- Serve as primary administrator and expert for Salesforce CRM, Laserfiche and other programs over time.

3) Client Service and Administrative - (25%):

- Lead effort to ensure that main phone line is always covered by live person during Allodium business hours.
- Professionally answer and manage inbound calls from clients, vendors, etc.
- Pleasantly greet guests and visitors to our office at the front desk.
- Help update and manage Salesforce CRM database.
- Add and organize documents in Laserfiche document management system.
- Assist with variety of client service efforts and projects, as needed.
- Serve on various committees – such as compliance and client service – to work on related projects and efforts.
- Chair employee committee to help foster a strong and positive team culture and work environment.

Qualifications:

Minimum Qualifications:

- BA or BS degree, ideally in business or related field.
- 3 years of successful operations, administrative and/or client service experience.
- Ability to reliably work week days from 8 am – 5 pm in our Minneapolis office.
- Pleasant, professional and friendly manner with excellent interpersonal skills with clients and peers.
- Strong team player.
- Highly organized and detail oriented.
- Demonstrated reliability and punctuality.
- Demonstrated flexibility, versatility and ability to simultaneously juggle multiple projects and priorities.
- Proven analytical and independent problem-solving skills.
- Highly proficient with Microsoft Office and other office software and eager to learn how to use more.
- Highly proficient with office technology like computers, copiers, printers, fax machines, scanners etc.
- Demonstrated client service orientation and excellence.
- Unquestionable personal and business ethics and integrity.
- Excellent written and verbal communication skills.

Preferred Qualifications:

- Experience working in professional office environment, ideally in the financial services industry.
- Experience with following software:
 - CRM software like Salesforce.com.
 - Electronic document management software like Laserfiche.
- Independent project management experience.

Salary and Benefits:

Starting base salary commensurate with experience, qualifications and performance. Bonus opportunity is available. Competitive benefits include paid time off and medical, dental, vision, life and long-term disability insurance.

How To Apply:

Please submit the following items to info@allodium.com for consideration:

- 1) Brief letter of introduction.
- 2) Resume.
- 3) Minimum salary requirements.

Allodium Investment Consultants is an Equal Opportunity Employer.