

KANAWHA

CAPITAL MANAGEMENT

JOB TITLE: Operations Associate

Kanawha Capital Management is a well-established registered investment adviser located in Richmond, Virginia. With assets under management in excess of \$1 billion, we have been providing wealth and investment management services to high-net-worth private clients for over thirty years.

POSITION

We are seeking an Operations Associate who is a successful multi-tasker with strong communication skills, a problem-solving mindset, and an ability to leverage technology to drive enterprise efficiency. The ideal candidate will be expected to:

- Provide superior client service in the account administration process.
- Prioritize and organize workflow across all facets of the operation and administration of client accounts.
- Handle backup trading responsibilities. Implement investment purchases and sales across accounts while ensuring regulatory compliance.
- Reconcile daily account activity to ensure accuracy.
- Utilize information technology and software skills to maximize operational efficiency and enhance client experience.
- Assist in the onboarding of new relationships which includes preparing various custodian forms and advisor contracts.
- Process client requests (money journals, wire transfers, checks, gifts, retirement account distributions, etc.).
- Assist with financial plan data entry.

QUALIFICATIONS / CHARACTERISTICS

- A minimum of one to two years of experience working in financial planning and/or private wealth management.
- Previous experience, including internships, involving customer service in financial services industry.
- BA/BS degree is preferred.
- Proficiency in Microsoft Office suite of products including Word, Excel, and PowerPoint.
- Experience with Advent suite of products is preferred.
- Attention to detail with strong written and verbal communication skills.
- Ability to work effectively in a team environment.
- Positive demeanor with mindset to learn new tasks and expand responsibilities.

COMPENSATION

Base salary plus potential bonus compensation. Comprehensive benefits package including options for medical/dental/vision coverage, 401(k) retirement plan with employer profit sharing contributions, short/long term disability, group life insurance, and paid time off.

To Apply: Please email a cover letter and resume to info@kancap.com.