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Who We Are

Life + Money = It's Complicated. The Planning Center is a fee-only financial planning firm that provides a safe place for their clients to discuss what matters most to them and their family with a team of trusted financial advisors. Our goal is to help people make better decisions as they navigate life's transitions and guide them toward the life they want. We have 6 locations within the U.S. and are continuing to expand our office and client footprint. As a mid-size privately owned company, we value diverse perspectives, entrepreneurial thinking, and above all a commitment to always act in our client's best interests.

What You'll Do

To support our current business and to prepare us for future growth, we are looking for an Operations Manager to lead the day to day aspects of our business. Your responsibilities will include:

- Develop and implement company-wide processes that will allow us to more effectively and consistently serve our clients
- Provide expertise and company leadership in opportunity identification, problem definition, data analysis and solution development in various areas of the company
- In conjunction with the President and CFO, manage the operating budget, external vendor relationships and facility needs
- Build an operations team from scratch, including role definition, hiring activities and onboarding
- Assist the President and Chief Compliance Officer with maintain and building systems and processes to ensure we stay in compliance with SEC regulations
- Learn and eventually supervise client portfolio trading and management systems and processes

What You Need

- 5+ years of experience developing, implementing and improving processes within an organization
- Demonstrated ability to manage and analyze large amounts of data and make data-driven decisions
- Ability to think independently and solve complex problems

- Experience building and leading a team, including job definition, hiring, and ongoing development and coaching

Education

- Bachelor's Degree in one of the following areas: Industrial Engineering, Management Information Systems, Supply Chain Management, Business Management, Accounting/Finance or other related field
- MBA or other advanced degree is desired but not required

What Makes You Stand Out

- Experience/exposure to Six Sigma or other similar process methodology
- Experience in a financial services or banking organization or exposure to investment management processes
- Database management and data analysis tools (Excel, SPSS, Tableau or similar)

What's In It For You

At The Planning Center, you'll be part of a multi-generational team with a collective entrepreneurial mindset that is focused on changing the way our clients make decisions on Life and Money. You will have the unique opportunity to build an operations team that lays the foundation to the company's success and future growth. We also provide a competitive salary and benefits package as well as encouragement and support of your life outside of work.