

About The Firm

Q3 Asset Management is a fast-growing investment advisory firm located in the rail district of Birmingham, Michigan. We work with financial professionals around the country to provide managed account solutions to their clients. Service is our top priority in everything we do.



Job Overview

Q3 is seeking an **Operations Associate**. We're looking for a motivated individual to work with our wholesalers in both an administrative and sales capacity. This role offers an excellent opportunity to learn about active investment management and can provide a challenging and fulfilling long-term career development path for the successful candidate.

An Operations Associate is an integral team member who takes ownership of assigned tasks, possesses strong prioritization and excellent organizational skills, and can manage multiple, time-sensitive tasks.

Key Responsibilities

Job responsibilities include but are not limited to:

- Processing new account paperwork and customer service requests
- Scanning and digitally storing client files
- Ongoing process improvement
- Communicating with external wholesalers and financial professionals
- Preparing reports, proposals, contracts, and work products (Word, Excel, PowerPoint, Adobe Acrobat)
- Conducting basic research as requested by staff
- Answering the general office phone and assisting clients with common questions

Qualifications

- Preferably at least two years of experience in financial services
- Undergraduate degree or equivalent experience preferred
- Proficient with Microsoft Office and able to quickly adapt to firm-specific software
- Knowledge of clerical and general office procedures
- Strong organizational and problem-solving capabilities
- Basic research and reporting skills
- Skill in establishing and maintaining effective working relationships with staff, clients, and the general public
- Editing & proofreading skills

Qualities

- Strong oral and written communication skills
- Organized and creative
- Ability to prioritize and manage multiple assignments
- Ability to work independently
- Commitment to excellence
- Strong sense of personal responsibility
- High ethical standards
- Team player

Compensation

This is an opportunity to get in at the ground floor with a growing firm. We look forward to hearing from you.
(Starting Salary: \$34,000 - \$42,000 depending on experience + benefits)

If you are ready to experience the challenge, satisfaction, and reward of an opportunity with Q3 Asset Management, please apply here, or refer a qualified candidate.