Based in New Albany, OH, VELA Investment Management is a vertically integrated wealth and investment advisory firm, serving individuals, families, non-profits, and institutions. Our primary goal is to deliver long-term results for our clients, in a consistent and transparent manner. We accomplish this through experienced investors employing a valuation-centric approach with a long-term temperament and aligning our interests with those of our clients.

**JOB TITLE**
Senior Operations & Client Service Associate

**SUMMARY**
The senior investment operations associate is responsible for overseeing and executing a wide array of responsibilities related to administrative and operational processes of client portfolios.

The senior associate will be responsible for process efficiencies and automations, data integrity, creation and audits of internal and external reporting, and optimal use of systems.

**KEY RESPONSIBILITIES**

Operations
- Execute operational activities related to client accounts including new account creation, security creation, and mutual fund reconciliation.
- Serve as key member of firm's GIPS committee, providing direction for decision making.
- Design various control techniques and methodologies for the implementation of automated solutions.
- Create and maintain process documents for critical operational workflows.
- Cross-train team members in operational tasks and responsibilities.
- Act as system owner for Advent, Morningstar Direct, and CRM, including build out of systems for use at VELA; identify opportunities to automate, troubleshoot challenges, maximize efficiencies, and research and rectify issues.
- Oversee data entry and population in various industry databases.

Client Service
- Oversee new client account setup and onboarding, ensuring accuracy of data inputs.
- Create invoices and statements for client accounts, ensuring data integrity is analyzed and maintained properly.
- Continuously monitor client accounts to ensure complete compliance with internal procedures and policies.
- Prepare materials for client meetings and coordinate client account reviews, verifying for accuracy; assist in drafting and reviewing client correspondence and commentary.
- Produce, analyze, and verify strategy and competitor due diligence reports.
- Understand underlying strategy investments with respect to client accounts and their respective holdings.

**ESSENTIAL SKILLS**
- Extensive knowledge of GIPS standards, policies, and procedures.
- Extensive experience working with Advent, Morningstar Direct and FactSet.
- Demonstrated success in establishing and improving processes and workflows.
- Strong attention to detail and excellent analytical skills with the ability to multitask and prioritize responsibilities even in a fast-paced work environment.

- Strong communication skills combined with superior organization and effective decision-making skills.
- Ability to take initiative, manage tasks, and handle projects independently from inception to completion.

**EDUCATION & EXPERIENCE**

- Bachelor's degree from an accredited university or college in accounting, finance, business, engineering, or related field required.
- CFA preferred.
- 5+ years of experience in middle or back-office setting.
- Strong knowledge of financial services industry.

At VELA, we recognize that our team members are our finest assets. They are dependable, collaborative, and innovative. We prioritize cultivating and supporting our team members, and we endeavor to create and nurture a culture of continuous learning and intelligent investing.

Interested? Please send a current resume to engage@vela-im.com.

VELA is an equal opportunity employer.