



DALLAS • NEW ORLEANS • SAN ANTONIO

**Position:** Operations Specialist

### **Firm Description**

Southern Wealth Management (SWM) is a multi-family office that provides wealthy individuals and families the ideal combination of experience and knowledge to help them make more informed financial decisions, and to better understand the implications of those decisions. We provide a highly personalized, coordinated family office approach to addressing a client's financial situation. Our seven core disciplines are:

- Financial and estate planning
- Business succession planning, including business valuation
- Tax consulting, compliance and filing of returns
- Investment portfolio design and management
- Life insurance portfolio design and management
- Philanthropic planning and plan management
- Family office services such as bookkeeping, bill pay and management of holdings

SWM is currently looking to fill the position of Operations Specialist that will work primarily alongside the senior leadership of the firm to bring together fluid processes, integrate applicable technologies, and best practice efficiencies within and between all major areas of business.

### **Position Description**

The duties of the Operations Specialist include the following:

- Manage internal systems and processes for account opening, data and information flow to/from clients, internal workflow, and other related business functions.
- Manage firm-wide special projects and facilitate internal communication as necessary.
- Collaborate with multiple teams and professionals across the firm's three offices.
- Facilitate and perform various key administrative tasks such as prepare and process paperwork for opening and closing brokerage accounts and assist with money movement (wires, check requests, etc.).
- Create documents, spreadsheets, work flow exhibits, and presentations.
- Operate as the liaison between the firm's custodial and other technology and system relationships.

*SOUTHERN WEALTH MANAGEMENT LLP 5005 LBJ FREEWAY SUITE 920 DALLAS, TX 75244  
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## **Requirements/Qualifications**

- 3+ years of experience in an operations role with a financial services company.
- Highly organized, self-motivated, and proactive professional with strong all around communication skills.
- Excellent computer and technology skills.
- Experience with document management systems (DMS), customer relations management (CRM) software, investment performance reporting software, financial planning software, and/or custodial interface systems is highly preferred.
- Experience exercising discretion and confidentiality with sensitive information.

## **How to Apply**

If you are interested in the above position, please send a cover letter and resume to the following:

Mr. Michael A. Horlick  
Southern Wealth Management  
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Dallas, TX 75244  
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