

About Foster & Motley

Foster & Motley is an independent, employee owned, fee-only wealth management firm providing clients with comprehensive financial planning and investment management services. We manage \$1.4 billion in client assets, have 37 dedicated employees and have been recognized as a finalist of the Cincinnati Business Courier's Best Places to Work in 2018 and 2019. Our culture promotes collaboration, professional growth, and a commitment to providing exceptional client service.

Position Summary

Full time opportunity in Cincinnati, Ohio (Kenwood area) for experienced hands-on technology and operations leader. A comprehensive knowledge transfer program with current manager will ease the new manager's transition into this key role.

Major Responsibilities

Leadership and Management

- Responsible for planning and execution of firm's technology and operations strategy.
- Leverage strong project management and team leadership skills to organize, prioritize and manage multiple team projects. Maintain technology roadmap and budget.
- Maintain response policies and procedures for cybersecurity incidents, disaster recovery and business continuity. Conduct readiness drills and training.

Network & Systems

- Maintain reliable and secure network and systems infrastructure, data network and telecommunication systems.
- Hands-on administration of Windows 10 desktop and mobile computers, Microsoft Office 365, Exchange Online, Cisco Umbrella, Active Directory, Azure AD Connect, Group Policy, SonicWall VPN, Ubiquiti wireless networks.
- Monitor and assess risks that impact systems access and reliability, network security and data integrity. Implement system hardening policies and controls.
- Oversee 3rd party technology vendor.

Business Operations

- Lead technology and operations team. Supervise operations specialists responsible for business support activities that include data management, account reconciliation, portfolio accounting, website updates, marketing support, client portal management and compliance support.
- Administer and support business applications including Microsoft Office, Tamarac Reporting and Trading, netDocuments, Salesforce, eMoney, PreciseFP and Schwab Institutional. Coordinate user training. Lead selection and deployment of new systems.
- Become familiar with firm's business practices and processes in order to identify opportunities to improve processes through automation. Research and prototype prospective solutions. Continually assess and plan for future business needs.

Knowledge Skills and Abilities

- Familiar with a variety of technology system concepts, best practices, and procedures.
- Rely on experience and judgment to plan and accomplish goals.
- A wide degree of technical problem-solving skills, creativity and business aptitude is expected.
- Excellent written and verbal communication skills. Present ideas in non-technical language.
- Must be able to work independently and with others.

Qualifications

- Bachelor's degree in relevant field and / or equivalent work experience.
- Must be experienced providing comprehensive technology and business systems services in small-to-medium sized businesses environment.
- Relevant experience in financial services sector (accounting, financial planning, investment management) is a plus.

What we offer:

1. Collaborative work environment where you can make a difference in the lives of our clients
2. Competitive salary commensurate with experience
3. Annual profitability/performance bonus
4. Safe Harbor 401(k) plan with discretionary profit sharing
5. Medical, Short-Term/Long-Term Disability and Group Life insurance
6. Paid vacation
7. Opportunities for professional growth and continuing education

If interested, please email resume to careers@fosterandmotley.com. All inquiries will be held in the strictest confidence.