



Trading Operations Analyst

The Pacific Financial Group, Inc. - Remote

\$55,000 - \$63,000 a year

The Trading Operations Analyst reports directly to the Trading Supervisor and will support the trading and operations team.

The primary responsibilities of this role include:

- Investing new accounts across various custodians
- Trade for check requests, investment changes and resigns
- Ensure trades are completed accurately
- Verify all client accounts are invested according to their discipline
- Analyzing client account performance
- Performing manual account reconciliation
- Review data queries and reports for account activity that needs review or action taken
- Produce daily reports for portfolio managers

Job Requirements:

- Prior experience in the financial services industry either with a broker/dealer, Investment Advisor, or Registered Investment Advisor
- 2+ years of Back Office or Trade Operations experience strongly preferred
- Knowledge of the securities industry
- Experience with a portfolio accounting system and CRM software
- Strong computer skills with proficiency in Microsoft Office Suite (with emphasis on Excel and Word)
- Ability to communicate professionally and confidentially with clients and fellow employees
- Ability to routinely manage time sensitive situations
- Well-organized and able to manage multiple priorities
- College graduate is preferred, but we are willing to consider industry experience in lieu of a degree.

Hours:

- Full time
- Start time is 6:00am PST
- Overtime may be required occasionally

The Pacific Financial Group is an innovative, fast growing investment and WealthTech company that has prided itself on the principle that everyone should have access to quality, independent investment advice. We maintain a friendly, supportive workplace in which each individual is given the opportunity to advance their potential. We are looking for an Operations Analyst who is organized, detail-oriented, and has strong communication skills.

Our company offers competitive salary and benefits including:

- 100% Company paid Medical, Dental, and Vision insurance coverage for employee
- Scheduled Holidays, following the NYSE calendar
- Uncapped PTO policy
- Participation in company 401K plan, upon completion of the eligibility requirements, with employer match

- Additional health insurance coverage available at personal cost, such as additional life, Flexible Spending Account (FSA), long-term disability, and/or short-term disability.

Apply by sending your resume to **careers@tpfg.com**

To apply for this position, please email your resume and a cover letter to careers@tpfg.com for increased consideration.

Job Type: Full-time

Benefits:

- 401(k)
- Dental insurance
- Flexible spending account
- Health insurance
- Life insurance
- Paid time off
- Vision insurance

Schedule:

- Monday to Friday

Work Location: Remote