

FIRM SUMMARY



Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over \$6.5 billion of client assets under management and 87 employees. Our clients include individuals, multi-generational families, family offices, foundations, endowments, and retirement plans. We employ an array of wealth strategies and services to help our clients accomplish their goals.

POSITION

Operations Specialist

OFFICE

Nashville

SUMMARY

DTC is a growing company, looking to add to our Nashville Team. We are seeking highly motivated, service-oriented, entrepreneurial-minded financial planning professionals.

CONTACT

HR-Nashville@diversifiedtrust.com

FOR MORE INFO ON DTC

diversifiedtrust.com

Please review our videos.

FLSA STATUS: EXEMPT

DISCLAIMER:

This position description is not intended, and should not be construed to be, an exhaustive list of all responsibilities, skills, efforts or working conditions associated with the job. It is intended, however, to be an accurate summary of those principal job elements essential for making decisions related to job performance, employee development and compensation. This position may be required to perform other duties and responsibilities as assigned.

As an Operations Specialist, a typical day might include the following:

- Process account transfers, distributions, and deposits
- Manage client statement and tax reporting packages
- Collect and process information to set up new accounts
- Remit tax filings and payments
- Handle client needs for online access enrollment
- Maintain client contact information
- Help client service teams handle other administrative tasks

This job might be for you if:

- You like helping people - we are in the relationship business, so helping people (our clients and the team) is key; client service is in your blood
- You enjoy solving problems - if you don't know the answer, you dig until you find it; you enjoy finding creative solutions to problems
- You pay attention to the details - anything worth doing is worth doing right; you stay focused and things do not fall through the cracks
- You communicate clearly - you are well-written; you speak articulately; you are comfortable communicating in writing and on the phone
- You take confidentiality seriously - you maintain strict confidentiality of client and company information
- You are interested in what we do - financial planning, investments, and markets are exciting to you

Qualifications for this job include:

- At least two years of experience in the wealth / investment management or finance fields
- A Bachelor's degree preferred

If this job seems like a good fit, please email your resume and cover letter to HR-Nashville@diversifiedtrust.com