Operations Associate

Summary
We are seeking a motivated and energetic professional to assume the role of Operations Associate in our Alpharetta location. This is a great opportunity for the up-and-comer in financial services. Do you desire to become a member of a fast-growing, well-respected team in the financial planning industry? oXYGen is the place for you!

Responsibilities:
- Maintain client information in our records database.
- Answer incoming calls
- Maintain lobby appearance and ensure supplies are stocked
- Greet all visitors and immerse them in the oXYGen experience
- Prepare, send & process mail
- Assist with various office tasks including such things as scanning and filing
- Manage Insurance licenses for agency & individual advisors
- Coordinate the payroll for insurance agency
- Manage client survey process
- Draft, review, or edit client correspondence for the Advisors
- Prepare paperwork to open and/or maintain client accounts to the specifications requested by the Advisor
- Follow the guidelines provided to achieve goals and deliverables that support business goals in collaboration with management and stakeholders.
- Assist in developing processes and procedures that enhance accuracy and streamline processes.
- Assist in setting and continually meeting project expectations with team members and management.

Qualifications:
- Bachelor’s degree in business administration, accounting, finance, or similar field of study is preferred but not required
- Minimum of one or two years in a financial services industry
- Computer literacy to easily learn new programs
- An advanced working knowledge of Microsoft Office (Excel, Word, Outlook)
- A natural acumen for numbers
- The desire to conduct research
- A genuine interest in the financial services industry
- Maintain a positive, friendly attitude
- Desire to provide world-class client service

Administrative/Technical Skills:
- Attention to details
- Planning and organizational skills
- Manage multiple projects with precision
- Written and verbal communication skills
Benefits:
In exchange for your expertise, we offer a base salary, bonus potential, 401(k) plus matching, health benefits, and a great working environment. This is your chance to play a key role in the continued success of our company.

We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status, or any other characteristic protected by law.

Our Vision
To provide a modern day family office for the X & Y Generations

Our Mission
To help our clients breathe easier® about life

Who We Are
oXYGen Financial, Inc. is built to give Generation X & Y clients a place where they can find professionals who are just like them, who understand they are looking for an advisor who provides a high tech and high touch approach with a discipline to help them manage their day to day financial lives.

Our Core Philosophy
We are independently owned and passionately committed to helping each client address their dreams and goals. We can be certain to shop the marketplace for what is best for each client’s financial situation.