

FIRM SUMMARY

Diversified Trust is an employee-owned comprehensive wealth management firm based in the Southeast with over \$8 billion of client assets under management. Our clients include individuals, multi-generational families, family offices, foundations, endowments and retirement plans. We provide tailored investment management, financial planning, trust and estate, family office, and institutional advisory services through our offices in Atlanta, Greensboro, Memphis and Nashville.

POSITION

Operations Associate

OFFICE

Nashville

SUMMARY

Diversified Trust is a growing company, looking to add to our Nashville Team. We are seeking highly motivated, service-oriented, entrepreneurial-minded individuals to join us.

CONTACT

HR@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 reflection of those principal job elements essential for making decisions related to job performance, employee development and compensation. As such, the incumbent may perform other duties and responsibilities as required.

Operations Associate Position Summary:

The Operations Associate will provide support to the Operations department, inclusive of the following primary duties and responsibilities:

- Work closely with the Operations team to establish and promote best practices across the firm and the adoption and use of core business applications
- Assist in the compilation and documentation of investment operations functions, processes, and procedures
- Provide support as needed for various Investment Operations functions (may include but not be limited to alternative asset administration, trade administration, system maintenance and administration, etc.)
- Assist in the operational tax and alternative asset reporting responsibilities, including the production and distribution of tax and alternative asset reports
- Provide support as needed for various Technology-Business Applications functions (may include, but not be limited to, system maintenance and administration, support in the development, testing, and implementation of automated workflows, etc.)
- Other responsibilities as may be assigned (all personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed.)

Skills and Qualifications:

- Bachelor's degree or equivalent education and related training; *degree in business, finance or accounting preferred*
- Exposure to and familiarity with accounting principles, financial markets, performance measurement and reporting systems preferred
- Experience or familiarity with alternative asset administration preferred
- Intellectual curiosity and strong work ethic
- Attention to detail with excellent organizational skills and the ability to work independently
- Solid communication and interpersonal skills with the ability to multi-task and adapt to rapid changes
- Excellent computer skills, with specific proficiency in Microsoft Office Suite
- Comfortable with hybrid work environment (combination of remote and in-office)
- Ability to maintain strict confidentiality of client and company information and to effectively follow risk management policies and procedures

If this job seems like a good fit, please email your resume to HR@diversifiedtrust.com