FP TRANSITIONS®

Title: Department Operations Coordinator
Classification: Full-time Non-Exempt
Department: Financial Analysis

Objective: As a Department Coordinator at FP Transitions, you will serve as the administrative backbone of your team, managing the day-to-day operational and coordination tasks that keep projects moving, clients informed, and internal processes running smoothly. This highly administrative role requires strong organizational skills, meticulous attention to detail, and the ability to manage multiple priorities simultaneously.

Role Summary: You will act as the key liaison between clients, your team, and other internal departments, providing both client-facing and behind-the-scenes support. While you will work closely with your team and leadership, you will be expected to operate independently, managing a high volume of tasks and communicating proactively when issues arise.

Department Coordinators shepherd clients through their entire journey, serving as a reliable point of contact for scheduling, documentation, data entry, and correspondence. You will champion excellence as an essential contributor who understands, executes, and continuously refines an ideal client experience.

Ideal Candidate:

The ideal candidate is a proactive, detail-oriented professional with strong critical thinking skills who thrives on keeping people and projects organized. They bring at least three years of experience in administrative or project coordination roles, with proven skill in managing timelines, improving processes, and balancing priorities. They are tech-savvy and confident working with data, reporting, and documentation, and they communicate clearly, maintain confidentiality, and anticipate needs before they arise. A genuine passion for creating smooth, efficient experiences for clients and colleagues alike is a must.

Essential Functions:

Administrative Support

- Provide day-to-day administrative and operational support to the team and clients, including scheduling, data entry, and correspondence across multiple time zones.
- Maintain organized records and documentation to ensure efficient workflows.

Project Coordination

- Manage client projects from start to finish, ensuring milestones are met and deliverables are completed with accuracy and quality.
- Collaborate with internal teams to ensure smooth transitions and a unified client experience.

Process Improvement

- Identify opportunities to improve efficiency, streamline workflows, and enhance client or team experiences.

- Work with leadership to update and document standard operating procedures.

Data and Payment Management

- Collect, verify, and organize client data to maintain accuracy within the CRM and reporting systems.
- Coordinate payment collection and tracking to ensure timely and accurate transactions.

Communication and Reporting

- Maintain proactive, transparent communication with clients and team members.
- Provide status updates, flag potential issues early, and report project progress to department leadership as needed.

Client Experience

- Serve as a consistent, reliable point of contact for clients throughout their engagement.
- Support a smooth client journey by anticipating needs, resolving concerns, and ensuring a professional, positive experience.

Technology and Systems:

- Learn and apply firm technology platforms, including Salesforce and department-specific tools, to manage workflows and troubleshoot client issues as needed.

Education and Experience:

Required

- Minimum 3 years of experience in administrative, project coordination, or operational roles
- Proven track record managing projects to completion on time and within scope
- Proficiency in CRM usage and Microsoft Office Suite
- Strong written and verbal communication skills with attention to confidentiality
- Excellent organization, prioritization, and time management abilities

Preferred

- Background in wealth management or financial services highly preferred
- Experience improving workflows or implementing process efficiencies
- Comfort analyzing data and preparing reports
- Experience with Salesforce, Slack, Smartsheet, Tableau, or Better Proposals preferred

Compensation and Benefits:

- $26.44–$33.65/hour DOE + performance-based bonuses
- Medical, Dental, Vision, 401k with 25% employer match
- Accrued PTO, Company holidays (including employee’s birthday)
- Company lunches, snacks, and team-building events.