FP TRANSITIONS®

Title: Department Operations Coordinator
Classification: Full-time Non-Exempt
Department: Equity Management Solutions

Objective: The Department Coordinator ensures our team and clients experience seamless, efficient support by building and maintaining organized, effective processes. This role strengthens collaboration, consistency, and client satisfaction through proactive coordination and administrative excellence.

Role Summary: As a Department Coordinator at FP Transitions, you will be the key liaison between our valued clients, your team, and other internal departments. You will provide behind-the-scenes intel to support your team and the company in staying on track to achieve their goals. While this role works closely with department leadership, you will be expected to work independently with minimal supervision and to communicate proactively should any issues arise.

Department Coordinators work closely with clients to shepherd them through their journey, ensuring a smooth and exceptional experience. You will act as a reliable point of contact, providing vital support and maintaining clear communication throughout the entire process. You will champion excellence on behalf of the firm, serving as an essential contributor who understands and executes an ideal client journey.

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're tech-savvy and are confident working with data, reporting, and documentation. They communicate clearly, maintain confidentiality, and anticipate needs before they arise. A genuine passion for creating smooth, efficient experiences for both clients and colleagues 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.