Director of Operations

Location: ClearVista Financial
Reports To: Lead Advisor & Owner
Department: Operations
Status: Full-Time | Salaried

This role offers significant growth potential for an ambitious operations professional seeking to build a career in leadership within a growing wealth management firm.

About ClearVista Financial

ClearVista Financial is an independent, relationship-driven financial services firm dedicated to helping clients make wise financial decisions with confidence and clarity. We believe exceptional client experiences are built on strong systems, thoughtful communication, and a team committed to continuous improvement.

As we continue to grow, we are seeking a Director of Operations who will play a key leadership role in building the infrastructure, processes, and operational excellence needed to support the next phase of the firm's growth.

This is more than an administrative position. It is an opportunity to become the operational backbone of a growing advisory firm and help create the systems, workflows, and team alignment that enable exceptional client service.

Position Overview

The Director of Operations serves as the firm's central coordinator, systems architect, and execution leader. This individual ensures that team members, processes, technology, and initiatives work together efficiently and effectively.

The ideal candidate is highly organized, strategically minded, process-oriented, and energized by creating order from complexity. They are comfortable taking ownership, leading projects, improving systems, and helping a growing business operate at a higher level.

Success in this role means advisors spend more time serving clients, the team operates with greater clarity and efficiency, and the firm's operations scale smoothly as the business grows.

What You'll Do

Operational Leadership & Process Development

- Design, document, and continuously improve firm-wide operating procedures and workflows.

- Identify opportunities to enhance efficiency, consistency, and scalability across all areas of the business.
- Lead operational improvement initiatives and help implement best practices throughout the firm.
- Evaluate and recommend technology, AI tools, automation, and systems that improve productivity and reduce manual work.
- Ensure operational standards are implemented consistently across the organization.

Project Management & Execution

- Lead and coordinate strategic initiatives, operational projects, technology implementations, and business improvements.
- Manage project timelines, priorities, deliverables, and accountability across departments.
- Ensure meetings, projects, and initiatives move forward efficiently from planning through execution.
- Monitor progress, remove obstacles, and maintain momentum on important business initiatives.

Team Coordination & Advisor Support

- Partner closely with the Lead Advisor and other team members to improve organizational effectiveness.
- Coordinate meeting preparation, follow-up workflows, and internal communication processes.
- Provide structure and accountability for team priorities and ongoing initiatives.
- Help ensure the right work is delegated to the right team members at the right time.

Cross-Functional Leadership

- Serve as the operational hub of the firm.
- Facilitate communication and coordination between advisors, operations, and marketing.
- Anticipate operational challenges and proactively implement solutions.
- Help align resources and priorities with the firm's strategic objectives.

Business & Administrative Management

- Maintain oversight of operational systems, technology platforms, vendor relationships, and internal resources.
- Assist with compliance-related operational requirements and documentation.
- Develop operational reporting and metrics that help leadership make informed decisions.
- Support long-term business planning by identifying opportunities for increased efficiency and scalability.

What We're Looking For

Required Qualifications

- Exceptional organizational and project management skills.
- Strong written and verbal communication abilities.
- Proven ability to create structure, improve systems, and manage multiple priorities simultaneously.
- Strong problem-solving and critical-thinking capabilities.
- Ability to work independently while collaborating effectively with a team.
- High degree of professionalism, discretion, and commitment to serving clients at a high level.

Preferred Qualifications

- Experience in wealth management, financial services, RIAs, or professional services organizations.
- Familiarity with CRM systems, workflow software, project management tools, and business technology platforms.
- Experience implementing process improvements and operational efficiencies.
- Comfort using AI, automation, and emerging technologies to improve business performance.
- SIE, Series 7, Series 66, or other industry-related licenses.
- Desire to grow into a senior operational leadership role as the firm expands.

Characteristics of Success

The ideal candidate:

- Takes ownership rather than waiting for direction.
- Naturally sees ways to improve systems and processes.
- Balances strategic thinking with strong execution.
- Thrives in a dynamic, growing business environment.
- Communicates clearly and effectively across all levels of the organization.
- Builds trust through reliability, follow-through, and attention to detail.
- Enjoys helping others succeed and creating an environment where teams can perform at their best.

How Success Will Be Measured

Within the first 12–18 months, successful performance will be reflected by:

- Improved efficiency and consistency across firm operations.
- Reduced administrative burden on advisors.
- Successful implementation of process improvements and automation initiatives.
- Strong project execution and accountability.
- Increased team alignment and communication.
- Enhanced client service through better operational support.
- Creation of scalable systems that position the firm for continued growth.

Why Join ClearVista Financial?

This is an opportunity to help shape the future of a growing, client-centered financial services firm. You will have meaningful influence, direct access to leadership, and the ability to make a visible impact on the firm's growth, efficiency, and client experience. If you enjoy building systems, solving problems, improving processes, and helping teams operate at their highest level, we'd love to hear from you.

Compensation, Benefits & Growth Opportunity

At ClearVista Financial, we view operations as a strategic function and are committed to investing in exceptional talent. We are seeking a long-term team member who is excited about helping build a growing firm and creating scalable systems that support both clients and team members.

Compensation

- Base salary: $60,000 - $85,000, commensurate with experience, qualifications, and industry background.
- Performance-based bonus opportunities tied to individual contributions and overall firm performance.
- Annual compensation reviews based on performance, growth, and increasing responsibilities.

Benefits

- Health Insurance
- Dental Insurance
- Vision Insurance
- Employer-sponsored retirement plan
- Generous Paid Time Off (PTO)

- Paid holidays
- Professional development and continuing education opportunities
- Technology and training resources to support success in the role

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To Apply

Please submit your resume and a brief cover letter explaining your interest in the role and why you believe you'd be a strong fit for ClearVista Financial to **mtrice@clearvistafinancial.com**.