Hurlow
WEALTH MANAGEMENT GROUP, INC.

Position Description

Title:	Operations Manager
Reports To:	Chief Operating Officer
Status:	Full-Time; Monday-Friday
Salary + Bonus:	$100,000 - $140,000 depending on experience and qualifications

Job Summary

We are seeking an Operations Manager to join our growing team. This role owns the day-to-day systems and processes that keep the firm running, spanning operations, technology, compliance support, billing, and firm administration. By taking on these operational responsibilities, the Operations Manager allows the firm's owners and advisors to stay high-level and focus their time on client relationships, business development, and client retention.

The right person is highly organized, process-oriented, and technically capable, and enjoys making systems run smoothly and taking ownership of the details. We actively encourage the use of AI to support this role and make it as efficient as possible, provided it stays consistent with the firm's AI use policy.

As the firm grows toward its long-term goals, this role will play a key part in scaling our operations and strengthening our technology and process infrastructure. For the right person, this position can lead to Director of Operations or Chief Operating Officer as the firm expands and its need for operational leadership increases.

We are looking for someone with great personality, exceptional teamwork and collaboration, and the desire to develop professionally in a fast-paced environment. We are a small, close-knit firm where everyone has a strong work ethic, a passion for our jobs, and deep care for our clients and one another.

Duties and Responsibilities

Operations and Administration

- ✓ Take on key operational responsibilities so that the firm's owners and advisors can remain high-level and focus their time on client relationships, business development, and client retention.
- ✓ Manage firm operations; develop, update, and monitor key operational procedures and workflows in Salesforce and Conga Orchestrate. Monitor for consistency and provide initial and ongoing training as needed.
- ✓ Run the firm's monthly client billing process, ensuring fees are calculated, reviewed, and processed accurately and on time.
- ✓ Manage the firm's knowledge management system (Guru), documenting and maintaining key operational and firm processes.
- ✓ Support advisors by building and maintaining dashboards and reports that help track business development activities.
- ✓ Support automation and process-improvement initiatives, including workflow automation and evaluation of new operational tools alongside firm leadership.
- ✓ Manage the firm's recruiting and interviewing process for open positions.
- ✓ Coordinate and run the onboarding process for new employees, including systems access, equipment setup, and initial training on firm processes.

- ✓ Manage the firm's insurance programs, including business owner's policy, errors and omissions, cyber, liability, and other business coverage.
- ✓ Manage the firm's employee benefits programs, including health insurance, the retirement plan, and related employee benefits.
- ✓ Manage the firm's physical office facilities, supporting the team with space, furniture, and equipment needs and serving as the liaison with building management.
- ✓ Solve general problems to assist team members in finding solutions for client requests or other operational challenges.
- ✓ Assist with any and all other firm-related duties aligned to deliver an extra-mile service experience to clients.

Technology and Systems

- ✓ Serve as a power user of the firm's core operational systems, including Salesforce (CRM), Black Diamond (portfolio accounting), Zoom (phone system and virtual meetings), Office 365 (email and calendar), OnceHub (scheduling), and Dropbox (document management), providing day-to-day support and identifying ways to use them more effectively.
- ✓ Serve as the primary internal resource for tech issues, including workstations, software, network, and copier/scanner/printer questions and problems, escalating to outsourced IT support as needed.
- ✓ Manage the firm's IT infrastructure and serve as the primary liaison with the outsourced IT vendor for devices (computers, monitors, and network equipment) and cybersecurity programs.
- ✓ Research and implement technology upgrades (hardware and software) to improve firm efficiency and client experience. New technology implementations should include a written plan with timeline, budget, partner approval, and a training plan.
- ✓ Utilize the firm's AI tools, including Claude and our custom AI platform Verlo, to improve efficiency across day-to-day operations, in accordance with the firm's AI use policy.
- ✓ Maintain a high-level understanding of the firm's advisor and investment technology (such as eMoney, RedBlack, Pontera, Holistiplan, and Nitrogen) as it relates to vendor due diligence, subscription management, and renewals, coordinating with the internal experts who own each system.
- ✓ Maintain and test the firm's business continuity and disaster recovery plan, ensuring data backup, system redundancy, and recovery procedures are current and aligned with the firm's cybersecurity and insurance coverage.
- ✓ Oversee the firm's cybersecurity procedures.

Compliance

- ✓ Support the firm's compliance program by ensuring all parts of the compliance manual are being completed accurately and efficiently.
- ✓ Maintain the firm's compliance program: update policies, provide training to the team on new laws or internal processes, maintain books and logs, file the ADV with support from our compliance outsource partner, and provide support for SEC examinations.
- ✓ Review and approve marketing and advertising materials prior to use.
- ✓ Perform vendor due diligence for new and existing service providers.

Qualifications

- ✓ Bachelor's degree in business administration, operations, information systems, or a related field.
- ✓ Five or more years of experience in operations, administration, or a technology/systems role, preferably in financial services or a similarly regulated environment.
- ✓ Strong technical aptitude and the ability to become a power user of the firm's core systems, including CRM, portfolio accounting, Microsoft Office 365, and document-management and scheduling tools.
- ✓ Experience with and the ability to effectively use AI tools such as Claude to assist with firm processes and efficiency.
- ✓ Comfort supporting compliance processes and following documented procedures accurately and consistently.
- ✓ Experience with billing, subscription and vendor management, or IT coordination is a plus.
- ✓ Incredible attention to detail, organization, prioritization, and follow-through.
- ✓ Strong ability to think critically and process complex operational scenarios.
- ✓ A collaborative, positive attitude and the ability to work well with others.
- ✓ Well-developed interpersonal and communication skills, both verbal and written.
- ✓ Ethical in decision making; sound in judgment.
- ✓ Strong time management skills; ability to multi-task and manage deadlines.
- ✓ Results driven, with the ability to take initiative.
- ✓ Desire, drive, and capability to work in a high-volume and growing team environment.
- ✓ Open and receptive to feedback and coaching.

Benefits

- ✓ Comprehensive medical, dental, vision, prescription, and life insurance. 100% paid by the company.
- ✓ 401(k) retirement plan with 3% automatic company contribution after six months of service.
- ✓ Paid Holidays: We are closed every day the New York Stock Exchange is closed.
- ✓ Paid Time Off: Unlimited, after 90 days of employment.
- ✓ Paid Maternity Leave: Up to 12 weeks of paid leave.
- ✓ Paid Paternity Leave: Up to four weeks of paid leave.
- ✓ Paid Sabbatical: Up to four consecutive weeks, after five years of service.
- ✓ Paid professional development, such as advanced designations and annual conferences.

How to Apply

Interested applicants should send their résumés with a cover letter to Hurlow Wealth Management Group, 3925 Hagan Street, Suite 300, Bloomington, IN 47401 or email to gnesbit@hurlowwealth.com. No phone calls please.

WEALTH MANAGEMENT GROUP, INC.

About Hurlow Wealth Management Group

Hurlow Wealth Management Group is a fee-only, fiduciary registered investment advisor with offices in Bloomington and Indianapolis, serving our clients as a collaborative team of financial planners, portfolio managers, and client service professionals. We are driven by a simple mission: to provide our clients with clarity, confidence, and comfort in their financial lives, simplifying the complex so they can focus on what matters most. We invest in our people the way we invest in our clients, offering a clear, realizable career path based on measurable performance objectives, along with training, mentorship, and educational opportunities through our internal Hurlow University, with a strong preference for promoting from within. By pairing a talented, values-driven team with industry-leading technology, we deliver an exceptional experience to every client we serve.

Since the inception of the company in 2002, our core values have been self-evident and have provided the framework for how – and why! – we operate.

- ✓ **Stay Invested** – We're fully committed to our clients, teammates, and community.
- ✓ **Keep It Clear** – Simplicity and clarity drive better decisions and results.
- ✓ **Make It Happen** – We take action, stay proactive, and own the outcome.
- ✓ **Level Up** – We continuously improve, grow, and push for excellence.
- ✓ **Enjoy the Ride** – We work hard, stay balanced, and enjoy the journey

Hurlow Wealth Management Group is an Equal Opportunity Employer, offering employment without regard to race, color, religion, sex, physical or mental disability, age, citizenship, pregnancy, genetic information, veteran status, gender identity, gender expression, sexual orientation, national origin, and any other protected status. This policy of nondiscrimination applies to all aspects of the employment relationship, including but not limited to, recruiting, hiring, training, advancement, promotion, demotion, transfer, selection for lay-off, termination, compensation, and benefits. We comply with all laws prohibiting discrimination.

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