



CRM Operations and IT Systems Associate

Rockwood Wealth Management is an established financial advisory firm serving clientele from our office in New Hope, PA. We are in the family wealth management business focusing on high-net-worth clients, families, and business owners. Through a planning process built on integrity, expertise, and attention to every detail, we navigate our clients through every phase of comprehensive financial planning and discretionary investment management. We have been serving this area and regional niche for more than 15 years and have a constantly evolving succession plan in place to ensure that we'll be here 30+ years from now.

This is a unique opportunity unlike most in the financial services industry. Our firm is completely independent...there is no broker dealer affiliation. Therefore, as fiduciaries our loyalty belongs exclusively to our clients. We offer a competitive compensation structure (salary and benefit package) and an equity ownership track for coworkers who demonstrate hard work and leadership characteristics while supporting the long-term goals of our firm. You will be a member of a collaborative and supportive team of high-performing colleagues all working hard to help us grow a successful and multigenerational business.

Position Overview

We are currently seeking a **CRM Operations and IT Systems Associate** in our **New Hope, PA** office who has experience working in a fast-paced professional environment, is highly organized and detail oriented. This role is crucial for ensuring our CRM platform is tailored to our needs, enhancing user experience, and leveraging the system to support business goals.

The position covers a wide range of responsibilities including, but not limited to:

- Management and improvement of the Microsoft Dynamics based CRM (preferably Tamarac CRM). This will include, but is not limited to, system management, creation of best practices, automation through workflows (using Power Automate), custom reporting (using CRM and Power BI), managing and implementing integrations, and driving increases in utilization rates.
- Management and improvement of Microsoft.
- Design, maintenance, and integrity of firm's internal reporting.
- Provide first level support for firm software, and basic hardware for the firm. This will include, but is not limited to basic desktop support, troubleshooting and escalating issues, procurement and setup of laptops and monitors, and maintaining onsite technology systems.
- Assist with Technical Procurement processes.
- Collaborate with colleagues across functions, including Compliance, Trading, Operations, Finance and Portfolio Management, to ensure that internal processes and outcomes are optimized.

Qualifications:

The successful candidate will have:

- Demonstrated exceptional computer literacy skills.
- Strong proficiency within Microsoft Office products, specifically Microsoft Excel required.
- Proven technical, analytical, and problem-solving skills.
- Ability to diagnose and resolve basic technical issues.
- Previous experience with Microsoft Dynamics, Tamarac CRM, and/or other Tamarac products.
- Previous experience working in RIA or Financial Advisory services is valuable, but not required.
- Ability to work effectively in a hybrid (remote and on-site) work environment.
- A bachelor's degree with a focus in Computer Science, Business, or a related field is preferred.

Salary and Benefits Information:

- Base salary commensurate with experience plus incentive bonus plan.
- Company covered employee medical and dental benefits.
- 401(k) plan with safe harbor matching employer contribution and discretionary profit-sharing plan.
- Employer sponsored health insurance and STD/LTD.
- Approved education and conference allowance.
- PTO and Paid Holidays.
- Hybrid/location flexible work environment: 3-1-1.
- Membership to local gym

All inquiries can be confidentially submitted to Careers@RockwoodWealth.com with your CV and cover letter.