

Systems Analyst Job Description

Saling Wealth Advisors

Saling Wealth Advisors is an independent wealth advisory firm based in Louisville Kentucky that provides strategic guidance for families and businesses. The firm was founded upon a desire to offer the ultimate client experience paired with a focused delivery of strategic wealth planning, to handle every aspect of clients' financial lives. With over 80 years of combined financial industry experience, the Saling Wealth Advisor team is prepared to serve as strategic partners in our clients' lives.

Job Description – Systems Analyst

Saling Wealth Advisors (SWA) has an opening for a Systems Analyst role. The Systems Analyst will be responsible for working with disparate databases and systems, gathering data and compiling it into usable and meaningful formats, and ultimately generating substantive and insightful reports. The analyst will work with the principals in the organization to determine business needs, match business needs with technology resources, and develop supportive and effective processes to drive performance in all areas of the business.

The individual best suited for this role will have the ability to effectively gather and analyze data to provide recommendations to improve reporting, operations, processes, as well as internal controls. A qualified candidate will possess exceptionally strong skills with the Microsoft Office Suite, with added emphasis on Excel. This person should have strong analytical and problem-solving skills.

In addition, this role will require that the candidate be able to lead integration and ongoing management for firm's primary third-party technology solution, focusing on maximizing usability of portfolio and client management software. Implement processes to drive greater efficiency and profitability, while delivering a superior level of service to clients.

In summary, this Analyst will help manage the receipt of information, the flow of data, create process improvements utilizing technology, develop reports, manage integration with the firms third-party technology provider, optimize client management software and generally be responsible for all systems, software and reporting.

Qualifications

Required:

- Undergraduate degree in math, statistics, computer science, IT or technology preferred
- Experience in back office systems and software within a business organization, including CRM, accounting systems and reporting software
- Be able to utilize systems and data to deliver powerful portfolio analysis and business intelligence reporting (internal and client-facing)
- A strong working knowledge of the Microsoft suite of tools and a high proficiency in MS Excel
- Detail oriented with exceptional analytical and creative problem-solving ability
- Minimum work experience of 2-3 years

- High level of integrity

Preferred:

- Background in financial Industry, oriented Information Systems, Math, Statistics, Economics or Finance
- Strong written and verbal communication skills
- Demonstrated ability to lead projects with cross-functional teams to meet consensus goals
- Flexible, comfortable working in a fast-paced environment and able to adapt to quick changes
- Experience with Tamarac Software
- Able to complete tasks with minimal supervision
- Self-motivated

Saling Wealth Advisors is family-centric, team oriented, purposeful in our guidance, progressive in our thought leadership and authentic in our client experience. We pride ourselves on providing the highest quality advice, service and support. Ideal candidates would value being part of a high-energy, supportive atmosphere and would be passionate about driving innovation to improve the service to and the lives of our clients. We have a strong team of professionals and if you feel qualified to join our organization as a Systems Analyst, please email your cover letter and resume to jason@salingadvisors.com.