

We're Hiring: Client Operations Associate

📍 Location: Dallas, TX

Ready to Elevate Your Career?

We are looking for a detail-oriented and highly organized Client Operations Associate (COA) to join our Dallas office. This role is a critical member of the operations team, responsible for executing investment-related transactions, maintaining data integrity across systems, and ensuring operational excellence in support of client portfolios.

The COA works closely with Wealth Advisors and Client Service Associates but is primarily focused on back-office execution, accuracy, and process management rather than direct client interaction.

What We Do

Versant is a multi-family office serving high-net-worth individuals and multi-generational families with a holistic approach. Our services go beyond traditional wealth management—we integrate investment management, tax and estate planning, and family office support to deliver a seamless client experience.

What You'll Do

Transaction Execution

- Execute money movement, including wires, ACH transfers, journals, and transfers
- Submit, track, and resolve account applications, transfers, and custodial requests
- Serve as the primary liaison with custodians to resolve operational issues

Account Management & Onboarding

- Own the operational side of client onboarding, including account setup and system integration
- Ensure all documentation is complete, accurate, and compliant with firm procedures
- Maintain and update client data across CRM, custodial, and reporting platforms

Operational Accuracy & Controls

- Maintain high standards for accuracy, timeliness, and documentation
- Perform reconciliations and identify/resolve data inconsistencies
- Ensure all processes follow compliance policies and internal procedures

What We're Looking For

Ideal Candidates Will Have:

- Bachelor's degree in finance, business, accounting, or related field (or equivalent experience)
- 2+ years of experience in operations, trading, or custodial roles within an RIA, family office, or financial services firm
- Experience with custodial platforms (e.g., Schwab, Pershing) and portfolio/reporting systems required

Skills & Attributes:

- Strong attention to detail and commitment to accuracy
- Process-driven with the ability to follow and improve workflows
- Strong problem-solving skills; able to troubleshoot operational issues
- Ability to manage multiple priorities in a fast-paced environment
- Systems-oriented mindset with comfort working across multiple platforms

Success in This Role:

- High accuracy and low error rates in transaction processing
- Timely execution of all operational requests
- Strong documentation and audit readiness
- Effective coordination with advisors and internal teams

Why Versant

We're more than a multi-family office. We're a team built on integrity, collaboration, and purpose. We believe in empowering both our clients and our people through a culture of trust, accountability, and growth.

What You Can Expect


- Competitive salary based on experience and qualifications
- Discretionary bonuses and incentive compensation
- Generous PTO and paid sick time
- Paid holidays
- Paid health, dental, and vision insurance
- Paid short- and long-term disability insurance
- Paid parental leave
- 401(k) and profit sharing
- Tuition reimbursement for professional development
- Matching gift charitable donation program
- Paid covered parking
- Team retreats, professional events, and firm-sponsored outings

This Is More Than a Job. It's a Career with Purpose.

If you're ready to work with a high-performing team, we'd love to hear from you.

Next Steps

Apply by sending your resume and cover letter to connected@versantcm.com

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