



About Litman Gregory and iM Global Partner

Founded in 1987, Litman Gregory offers wealth management services to individuals, families, and endowment and foundation organizations. Our research services are driven by strong asset allocation and manager selection expertise. Excellence and quality are core to our values, and our team of people is focused on client-centered service and collaborative connections.

Our wealth management business is based in the San Francisco Bay area, and we now benefit from a global network of professionals in 16 locations worldwide following our integration into iM Global Partner, a worldwide asset management network. Our relationships are built on trust, respect, and integrity. We believe that **'Performance is born out of people'** and that is clearly the case for our team of hard-working, motivated employees. We are growing fast, and as we grow, so will you. We believe that our company provides an important opportunity for people to expand their skill set and make their mark.

We have very high standards for our work and our investments are for the long term. This philosophy is reflected in our hiring process. We work hard to find the right fit and as a result we have a team of high performing, motivated and creative individuals

The role

The mission of the **AVP Business Technology Analyst** is to support the Wealth Management Services (WMS) Business in reviewing, studying, analyzing, interpreting, and evaluating business systems, technology, processes, and user needs. The Business Technology Analyst is responsible for identifying gaps in the current business model and guiding WMS in improving processes, services, policies, and technology to improve operating efficiency, user experience, accuracy, and scalability. The Business Technology Analyst is responsible for understanding, translating, reporting, and advising on the needs of the business with the use of technology and ensures deliverables are aligned with business needs and requirements.

The Business Technology Analyst manages different types of projects (technology, process improvement, efficiency, risk mitigation) and will be responsible for leading all aspects throughout the project life cycle, including planning and initiation, requirements gathering and documentation, testing, execution, and closure. The Business Technology Analyst will be responsible for tracking the status of each initiative and reporting to senior management. Given the scope of the responsibilities, experience leading projects and multi-tasking is critical for success in this role. The Business Technology Analyst drives project execution and coordinates resources through collaboration with relevant internal business units and support teams. They are accountable for ensuring all the project deliverables are implemented on time, on budget, and within scope to meet the expectations of project stakeholders.

Essential Duties

- Study business functions and gather information to determine operational gaps in operating efficiencies and business technology.
- Analyze and evaluate business systems, technology, processes, and user needs.
- Understand business problems, goals, workflows, organizational structure, and constraints.
- Provide solutions to business problems and detailed requirements for both business and technology enhancements.
- Identify trends; prepare and document recommendations and requirements for change in policy, procedures, control, or action.
- Create and share informative and actionable reports that highlights studies, trends and analysis in areas such as client assets under management, account management, account transactions, portfolio management, order management, performance reporting, governmental requirements, statistical reports, projections, and forecasts.
- Analyze wealth management business related data to determine present and future operational, service, and financial impact.
- Make recommendations to management regarding cost saving, risk mitigation, and profitability improvement strategies.
- Define and manage medium to large scale and complex wealth management service, operations, and technology projects throughout the entire project lifecycle, coordinating the efforts of internal team members, vendors, and stakeholders.
- Establish appropriate project governance, project scope, project sponsors, project plan, and project budget are adequately defined, in place and followed.

Qualifications

Essential

- Minimum 5 years Wealth Management industry experience in all aspects of investment management operations, systems, and process management and 3 years of project management experience.
- Ability to work with and influence all levels within the company
- Organizational savvy and astuteness to get results across-functions and levels.
- Excellent technical know-how, analytic, problem solving, business judgment and organizational skills.

- Clear and effective verbal and written communication skills, both interpersonally and in presentation settings.
- Demonstrated process management skills, including development of standards, process improvements, and the ability to identify and resolve performance problems.
- Outstanding work ethic, with a high sense of responsibility to the quality and timeliness in one's own work. Willingness and flexibility to jump into the details and get the job done.
- Demonstrated sense of urgency to resolve issues quickly and efficiently.
- Demonstrated ability to work on multiple projects and priorities simultaneously and with aggressive timelines.
- Experience with vendor and contract negotiation Strong skills and experience working end-to-end through all phases of a medium to large scale project using project management methodologies to develop project scope. documents, project management plans, communication materials, change requests and risk assessment/issue logs.
- Strong interpersonal skills; excellent management, leadership to work with multiple stakeholders across business units.
- Proficient in MS Office Suite including MS Word, Outlook, Excel, PowerPoint, CRM Dynamics, and SharePoint.
- Bachelor's Degree preferred.

Location

This role is based in our Walnut Creek, CA office.

iM Global Partner is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees. iM Global Partner encourages applications from people of all races, religions, national origins, genders, sexual orientations, gender identities, gender expressions, and ages, as well as veterans and individuals with disabilities.

If you are ready to join a team focused on excellence and ready to reap the rewards that come with it, then we invite you to apply with your resume and a short cover letter to recruiter@lgam.com.