



OFFICE MANAGER & CLIENT CONCIERGE

BSW OPERATIONS GROUP

Ideal Candidate – Who You Are:

- Do you enjoy helping people? Partnering with colleagues while also working independently?
- Are you skilled at making things run smoothly and organizing?
- Are you a people person who loves to coordinate events with friends, family, and colleagues?
- Are you known for your welcoming nature, steady demeanor, and ability to put people at ease?
- Are you detail-oriented and skilled at oversight, tracking, and keeping things up-to-date?
- Are you a jack-of-all-trades that is willing to jump in, lend a hand where needed, or learn new things?
- Are you looking to help build, grow, and shape a company that is nationally-recognized as a Best Place To Work and uses business as a force for good?

BSW Wealth Partners – Who We Are:

BSW is a multi-family office and wealth advisory firm managing \$1.25 billion for a national and international clientele from offices in Boulder and Denver. Our purpose is to Make Life Better. BSW has been named a Best Place to Work by Outside Magazine, Investment News, and the Denver Business Journal; one of the top 300 Financial Advisers by the Financial Times; is Gender Equity Now certified; a Certified B Corporation; and a Public Benefit Corporation (PBC).

Position Description – Your Dream Positions:

The BSW Office Manager & Client Concierge role comprises the following:

1. Help ensure that BSW is, and continues to be, a Best Place To Work!
2. Coordinate firm-wide operational items (HR, payables, technology, supplies, vendors, deposits, firm-wide calendar, etc.).
3. Support the Chief Executive Officer (CEO) and Chief Operating Officer (COO) with scheduling, correspondence, etc.
4. Provide a warm and professional welcome and assistance to BSW clients and colleagues.
5. Assist on Client Service (account applications, client signatures) + Marketing items (email blasts, sponsorships).

Qualifications – The Right Stuff:

- Experience in office management, administration, operations, or client-facing reception/assistance.
- Experience with oversight or administration of HR items or platforms.
- Experience in a professional services setting (investment firm, law firm, etc.) preferred, but not required.
- Passion for people (clients + colleagues).
- Attention to detail, well organized, self-motivated & self-managed.
- Outstanding integrity and discretion.
- Polished interpersonal + speaking abilities, and comfort/experience working high-end clients and professionals.
- Undergraduate or Associates degree preferred, but not required.

Perks – Why We’re A Perennial Best Place To Work:

- Winter & Summer Fun Days
- Profit Sharing, 401(k) Plan + Matching
- Health Savings Account + BSW-funded Healthcare
- Paid Maternity & Paternity Leave
- BSW pays for obtaining and maintaining professional certifications
- PTO Days for Volunteering
- Healthy Lifestyle & Custom Workspace



B-Corp Status, Diversity & Inclusivity – Another Reason You Will Be Proud to Work at BSW:

BSW Wealth Partners is a proud to be both a Public Benefit Corporation (PBC) and a Certified B Corporation. Certified B Corporations are for-profit companies seeking a better way to do business by meeting the highest standards of third party-verified social and environmental performance, accountability, and transparency. B Corp certification is part of a global movement that serves to redefine success in business so that companies aspire not only to be the best in the world, but best for the world. BSW’s certification highlights our commitment to diversity, equity, inclusion, and gender equity. **BSW is a company based on merit and excellence that welcome all races, genders, and sexual orientations.**

We encourage applications from all qualified candidates, including:

- Traditionally under-represented populations within financial services.
- Parents returning to the workforce after extended career breaks.
- People with physical disabilities or limitations.
- Transitioning military service members and veterans.

Application Process:

Submit your CV/résumé and a cover letter to info@bsw.com. In your cover letter, please address the following:

- *In your own words (20 or less), describe what you think BSW does.*
- *What are the top three reasons you are the best candidate for this position and for BSW?*
- *Why are you interested in our firm and this industry? What aspects? Do you have any applicable professional experience?*

