



## **Klaros is hiring! We're looking for a superb Operations Coordinator!**

### **Who We Are**

Klaros Advisors, LLC ([www.klaros.com](http://www.klaros.com)) is a boutique advisory firm focused on the future of financial services. We work with financial services firms of all sizes, types, and stages on strategic, operational, and risk management issues central to their success.

### **The Role**

Klaros is seeking an experienced Operations Coordinator to join our team. This role will provide essential support to our Head of Operations and Executive team, ensuring the smooth and efficient operation of our daily activities. The ideal candidate will be a proactive problem-solver with excellent administrative skills and a meticulous attention to detail, capable of both independent and collaborative work.

### **Key Responsibilities**

#### **Administrative Support**

- Coordinate and schedule internal meetings
- Maintain and organize company files and documentation (e.g., Google Drive structure, metadata tagging)
- Support business insurance renewals, policy tracking, and compliance documentation
- Perform data entry tasks to maintain up-to-date records in all systems
- Assist with creating invoices and expense reports
- Support client invoice tracking, following up as needed to ensure timely collection
- Support onboarding and offboarding processes for team members and vendors
- Assist with third-party portals and requests
- Update company templates, presentations, and internal reporting dashboards
- Support marketing efforts, including posting content on LinkedIn and our blog
- Provide general administrative support to the team as needed

#### **Project Management Support**

- Generate project data reports utilizing Salesforce and BigTime
- Support project teams with complex calendaring for client meetings and workshops
- Provide support to partners by customizing project related templates
- Assist with planning company events, conference travel, and staff activities
- Conduct ad hoc research and assist with special projects to improve operational efficiency
- Assist with project management and research for internal initiatives



## Who You Are

We're looking for a proactive, resourceful, and highly organized teammate with:

- Enthusiasm for Klaros and the company we are building;
  - Exceptional written and oral communication skills;
  - Exceptional attention to detail and strong analytical skills;
  - A process oriented mindset. You like following a plan, staying organized, and keeping impeccable notes along the way.
  - A collaborative spirit with a healthy sense of humor;
  - Commitment to the highest standards of honesty and integrity; and
  - Willingness to work remotely and with substantial independence and responsibility.
- Klaros was designed, pre-COVID, to be a remote work environment to allow us to attract the best people, wherever they may want to reside and to keep our cost structure efficient.

## Skills & Qualifications

- Associate's or Bachelor's degree
- 3+ years of proven experience in operations and/ or office administration
- Proficiency with Google Workspace and Slack
- Experience with Salesforce or other CRM tools a plus
- Strong organizational and project management skills

## What We Offer

- Great colleagues, interesting projects, big and complex challenges
- Competitive compensation and comprehensive benefits
- Fully remote work environment
- We'll be nice to you – direct when necessary, but never unkind

Klaros is committed to diversity and aspires to build an increasingly diverse organization. We welcome applicants without regard to gender, race, age, color, religion, sexual orientation, political affiliation, country of origin, disability, or similar personal attributes. We do, however, strongly value kindness, mutual respect, teamwork, and good humor. We seek only teammates who share those values.

As part of the design of our firm, we have no physical offices, so you can live anywhere in the U.S. with good broadband. Business travel is not common in our business, but you should be willing and able to travel if and when it is required. You must be able to work legally in the U.S.

Please submit your application using the link below.

<https://www.klaros.com/career-1>