



## Job Description

<b>Job Title:</b>	Project Manager/Senior Business Analyst
<b>Reports To:</b>	EVP, Advisor Services and Business Intelligence
<b>Salary:</b>	\$65,000-\$80,000 + bonus
<b>FLSA Status:</b>	Exempt

### Job Purpose

The successful candidate will act as a Project Manager/Senior Business Analyst managing a portfolio of small to large scale strategic and systems related initiatives for a rapidly growing financial services firm. The Project Manager/Senior Business Analyst will work with business unit leaders and cross-functional team members to facilitate the initiation and implementation of assigned project(s). The successful candidate will also participate in the identification and development of functional systems requirements and take ownership of the related tasks to support the IT and Operations goal of developing a robust investment management platform for Bellatore's clients.

### Duties and Responsibilities

- Develop detailed project plan(s) related to assigned initiatives
- Provide day-to-day project management expertise for one or more projects
- Act as project team member in identifying and developing systems requirements for the development of the investment management platform
- Participate in the analysis and planning related to data conversion and integration projects
- Manage projects to successful On Time/On Scope/On Budget delivery
- Manage delivery of critical path items from related subject matter experts or business line owners
- Proactively identify and report on risks, issues and dependencies for the project
- Provide appropriate feedback for course-correction on methodology to the project owner
- Support the development of Bellatore's Project Management Office
- Provide project management training to employees
- Other duties as assigned

### Qualifications

- Minimum 3 years project management experience
- BA or higher degree.
- Financial services industry experience required
- Experience with financial services CRM, portfolio accounting, billing and portfolio management systems is an asset.
- Strong oral and written communication skills

## About Bellatore

*Bellatore, LLC:* Bellatore, LLC is a financial services company that delivers knowledge leadership services and turnkey asset management solutions. Bellatore provides a distinct array of practice management services to independent financial advisors interested in accelerating their practices. Bellatore also helps financial institutions bring meaningful value to their businesses through practice management and business consulting, public speaking, wholesaler training, and business intelligence services. For more information, visit [www.bellatore.com](http://www.bellatore.com).

*Bellatore Investment Counsel:* Bellatore Investment Counsel delivers asset management services, investment products and business knowledge that support independent advisors and the investors they serve. The Bellatore Total Business Solution helps advisors accelerate their practices and focus on the areas where they add the most value. This customized outsourcing model centers on business management, back office support, investment solutions, succession and monetization services, and wealth planning. Bellatore Investment Counsel is a division of Bellatore Financial, Inc. For more information, visit <http://advisors.bellatore.com>.

Joining Bellatore means being part of a vibrant and growing team. We recognize that our clients' success—and our own—depends on our ability to continue to attract talented and highly motivated employees. We believe in putting clients first, building relationships, achieving quality results and working with integrity. We strive to bring a balance of work and life to our employees.

Bellatore offers comprehensive and competitive compensation packages and benefits programs. Highlights include:

- Five weeks paid time off
- Medical, dental and vision insurance
- 401(k) participation with profit sharing
- Incentive compensation program

We invite you to visit us at [www.bellatore.com](http://www.bellatore.com) to learn more about our company.

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To apply for this position, please send your resume to: [hr@bellatore.com](mailto:hr@bellatore.com) with “Project Manager” in the subject line.

*Bellatore is an Equal Opportunity Employer.*