BLBB Advisors
FINANCIAL GUIDANCE SINCE 1964℠

About BLBB Advisors

BLBB Advisors is a well-established Registered Investment Advisor (RIA) firm with over 60 years of experience since our founding in 1964. Managing approximately $3 billion in assets under management, we provide comprehensive financial planning and wealth management services to families, nonprofit organizations, and business owners in the greater Philadelphia area and beyond. Our collaborative and dedicated team is dedicated to helping clients achieve their financial goals through thoughtful, personalized strategies that address retirement planning, family dynamics, charitable giving, and more. At BLBB, we value trustworthiness, objectivity, patience, and a client-centered approach. Join a firm where your contributions support a legacy of excellence and community impact.

Job Summary

We are seeking a detail-oriented and proactive Operations Associate to join our Operations team in Montgomeryville, PA. The Operations Associate will provide critical support to internal teams, including Client Service, Operations, Compliance, and Trading. You will assist with day-to-day operational tasks to ensure smooth firm-wide processes, accurate data management, and regulatory compliance. This position offers an opportunity to contribute to a dynamic RIA environment while developing expertise in investment and client service operations.

Key Responsibilities

- Daily setup and maintenance of client and portfolio information, including accounts, households, fee schedules, registration types, and asset classifications, within internal systems.
- Review daily reconciliation reports and monitor for breaks and inconsistencies in data feeds.
- Develop and execute periodic data scrubs to ensure the integrity of information and output across systems (e.g., Tamarac, custodians, CRM).
- Research issues and collaborate with external support teams and internal colleagues to resolve discrepancies efficiently.
- Support the Client Service team with internal administrative tasks, such as meeting and quarterly reports, billing generation and review, and CRM data entry.

- Assist the Compliance team by reviewing documentation, tracking regulatory requirements, and helping maintain accurate records to ensure firm-wide adherence to policies and industry standards.
- Provide occasional support to the Trading team by monitoring portfolio cash levels and documenting procedures.
- Contribute to process improvements by identifying inefficiencies and supporting the implementation of streamlined workflows.

Qualifications

- Bachelor's degree in Finance, Business, Accounting, or a related field (or equivalent experience).
- 1-3 years of experience in financial services operations, preferably within an RIA or wealth management firm.
- Strong attention to detail, organizational skills, and the ability to manage multiple tasks in a fast-paced environment.
- Proficiency in Microsoft Office Suite (Excel, Word, Outlook); familiarity with financial software (e.g., portfolio management systems, CRM tools) is a plus.
- Basic understanding of investment operations and capital markets.
- Excellent communication skills for internal collaboration.
- Prior use of CRM software.

Preferred Skills

- Knowledge of RIA-specific tools or platforms (e.g., custodians such as Pershing, Fidelity and Schwab, or software such as Tamarac or Orion).
- Experience with portfolio management operations, compliance documentation, or data reconciliation.
- Ability to analyze data and identify discrepancies and outliers for remediation.
- Commitment to upholding high standards of data excellence and confidentiality.