

Associate | Executive Operations

Location: Westlake Village, CA

Job Type: Full Time

Area of Interest: Private Client

Company Description

One Capital Management, LLC ("OCM"), is a leading global wealth management firm that offers diversified wealth management services to private clients, endowments and foundations, investment companies, and institutions in the U.S. and Canada. OCM is well-positioned to tailor wealth management solutions for its clients through its wealth forecasting group and integrated investment management service.

Position Description

The **Associate | Executive Operations** provides high-level administrative and operational support to the President of the firm. This role manages complex schedules, coordinates executive communications, and facilitates critical business activities across the organization.

Specific responsibilities may include, but are not limited to:

- **Administrative Support for the President of the Firm**
 - Calendar Management: Schedule and coordinate meetings, calls, and travel for the President. Ensure preparation for meetings, presentations, and other key engagements.
 - Email and Correspondence: Manage incoming emails and communications.
 - Document Preparation: Prepare reports, presentations, and business documents as needed.
- **Travel & Expense Management**
 - Arrange and manage international and domestic travel for the President including flights, accommodations and ground travel
 - Oversee expense reporting and compliance with firm policies
- **Confidentiality:** Handle sensitive information with the utmost discretion and confidentiality.
- **Tracking & Documentation**
 - Maintain accurate records of client interactions, activities, and meetings in CRM systems, ensuring timely and compliant documentation.
- **Collaboration and Professional Development**
 - Participate in team projects, business initiatives, and continuous training opportunities to enhance skills and industry knowledge.

Job Requirements

- Excellent organizational skills with keen attention to detail and the ability to prioritize tasks.
- Strong communication skills, both written and verbal.
- Expertise in Microsoft Office Suite (Excel, PowerPoint, Word)
- Salesforce experience preferred.
- Bachelor's degree is preferred.
- 1-3 years professional experience is preferred.
- Familiarity with financial terminology and basic wealth management principles.

Compensation & Benefits

- Salary range: \$72,000 - \$85,000
- Performance Based Bonus
- Flexible and responsible paid time off (PTO).
- Participation and coverage under the company health care plan.
- Participation in the company 401(k) Plan.
- Reimburse up to \$75 monthly for a membership fee for the company Wellness Program.
- Company sponsorship in continuing education.

Interested applicants should submit their resume to hiring@onecapital.com.