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AWM Operations Analyst

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Company: JPMorgan Chase & Co.

Location: Buenos Aires

Category: computer-and-mathematical

The Private Bank and Wealth Management Securities Operations consists of various functions, such as Settlements, Transfers, Asset Servicing, Retirement and Asset Movement.

The **Customer Transfer team** is responsible of the transfer of assets to and from the client's accounts, based on instructions provided by Financial Advisors and counter broker institutions. The team's interaction with the client is through Financial Advisors, or SDI Team for all transfers submitted by Client on Digital Platform.

The Department is organized into 8 functions: **(1)** ACAT Receive, **(2)** ACAT Delivery, **(3)** Non-ACAT Receive, **(4)** Non-ACAT Delivery, **(5)** Direct Registration Service ("DRS"), **(6)** Mutual Fund Transfers Receives **(7)** Mutual Fund Transfers Deliveries and **(8)** Fail Reversals.

The main volume for the team's workload is represented by ACAT (Automated Customer Account Transfers) which are basically transfers that go via system, and require analysts reviewing transfer forms provided by Financial Advisors or SDI Team to make sure they are in good order before they're being processed. Non ACAT transfers are manually processed and apart from reviewing forms, a follow up process is implemented in order to ensure transfer gets complete.

As a Securities Operations Analyst, you will be responsible for operations processes and controls embedded in the daily workflow within your specific function.

Responsibilities:

Understand the function and relevant processes end to end. Cross training is implemented in a monthly basis, giving the team resiliency tools for back up.

Understand the fundamental concepts related to operational flow

Perform day-to-day operations which may include facilitating settlements, transfers, cashiers, asset servicing or reconciliation

Identify issues, analyze problems and provide viable solutions

Attend regular group meetings with managers to ensure appropriate communication; escalate issues; incorporate feedback into day-to-day processes

Adhere to operating procedures; ensure procedures are up to date; non routine tasks should be reviewed and documented as necessary

Skillsets:

Written and oral English skills (used on daily basis with the US counterparties when performing callbacks and sending emails to Financial Advisors and Contra firms)

Bachelor's degree or equivalent, preferred

Strong attention to details

Ability to prioritize workload from different sources

Able to deal with deadlines to meet the daily cut offs.

Ability to analyze a process, identify and implement improvements

Ability to adapt and be flexible in a team environment

Ability to demonstrate a strong client focus

Team player, within Transfers space and with other teams that work alongside with Transfers.

Proficient in Microsoft Office ie. Word, Excel, Access, Outlook

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