VIGILANT Capital Management, LLC

JOB POSTING: Sr. Manager of IT Systems, Data and Analytics

DATE: July 2021

Vigilant Capital Management, a growing wealth management firm with approximately $1.9 billion of client assets under management, is looking for a *Sr. Manager of IT Systems, Data and Analytics* to join its dynamic and talented team. This role works closely with the Executive Committee and other Senior Managers of the Firm to lead the technology and data management functions, through a combination of onsite and offsite support efforts.

This role may be based out of our Portland, Maine office or our Portsmouth, New Hampshire office. Remote working arrangements will be considered.

ESSENTIAL JOB FUNCTIONS:

- Oversee the firm's offsite technology vendors to include IT MSP, telecom and VoIP and other related providers
    - Manage and evaluate relationships with IT vendors and serve as the firm's point of contact
    - Ensure service standards and contractual agreements are satisfied among external vendors, and critical applications and equipment are performing effectively for end users
    - Follow up and follow through with issues that arise, facilitate cohesiveness among various providers to achieve optimum support/results for the firm and its end users
    - Review product and service offerings – present proposals to senior management for adoption of new technology/services
    - Partner with vendors to educate and roll out new products and services to staff
    - Negotiate contract terms and adequately plan and prepare for contract renewals
    - Review and approve associated invoice charges, as necessary
- Develop and oversee the strategies to best utilize the firm's business applications and data set
    - Oversee and drive coordination among the existing suite of software applications and third-party data services
    - Build and maintain reports and dashboards within the CRM system to track key business performance metrics
    - Organize data from disparate sources to identify impact, insights, and patterns
    - Conduct statistical analysis of data to identify potential areas for operating performance improvement
    - Work with website partners and marketing team to manage and analyze website data and performance
- Onsite technology support
    - Direct the installation, maintenance, replacement of all local technology hardware
    - Arrange end user on-boarding, off-boarding, provisioning, and de-provisioning
    - Track local inventory and age of equipment on asset inventory lists
    - Maintain up-to-date network maps
    - Ensure software and operating system updates are occurring, and that two-factor authentication and all other necessary security settings are in place
    - Provide onsite support to external vendors and end users, troubleshoot as needed in order to provide an effective and efficient work environment

- Maintain IT Handbook, document/implement IT related procedures and best practices
- Provide training to new and existing users as necessary
- Coordinate website content updates
- Oversee the firm's Cyber Security Policy/program
  - Use industry, government, legal, and third-party resources to stay current on cybersecurity threats and new regulations
  - Work closely with Chief Compliance Officer to ensure the firm's information technology practices are in compliance with the U.S. Securities and Exchange Commission and other regulatory bodies
  - Update/maintain the Cyber Security Policy & supporting documents as necessary for new threats, regulations and best practices
  - Identify, analyze, prioritize risks facing the firm and formulate a response where appropriate
  - Track actual cybersecurity events that impact the firm
  - Manage periodic testing of back up restore/ business continuity/ disaster recovery/ incident response plan, document results and implement changes as necessary
  - Perform cybersecurity related vendor due diligence
  - Conduct initial employee cybersecurity training and facilitate ongoing training through IT MSP
  - Assist with creation of client facing cybersecurity awareness publications
- Prepare necessary IT/cybersecurity related information in the event of a regulatory examination, analyze results and implement areas for improvement as needed
- Formulate forward-looking plans and related budgets for technology needs of the firm, both service and equipment related
- Play an active role in firm committees, prepare and contribute thoughts for agendas, raise concerns, suggest solutions, look for and implement efficiency and process improvement, ultimately serve as Chair of the Technology and Cyber Security Committees
- Other miscellaneous tasks and responsibilities, where the above list is not intended to be all-inclusive

KNOWLEDGE, SKILLS AND ABILITIES

- Ability to analyze and solve problems in a self-reliant, proactive and resourceful manner
- Ability to calmly work under pressure, with perseverance and fortitude
- Ability to communicate effectively in both oral and written form, excellent interpersonal and customer service skills
- Ability to effectively manage time, establish priorities, meet deadlines and juggle multiple tasks in a fast–paced environment
- Superior follow-up and follow-through skills in order to ensure a productive work environment, both internally with staff and externally with service providers
- Well-developed presentation skills – ability to identify areas of need, research and present appropriate solutions, effectively convey ideas and opinions to the senior management team
- Meticulous attention to detail – particularly as it relates to interpreting and understanding service agreements, regulations impacting our industry, etc.
- Ability to work both in a team-oriented environment and independently
- Ability to adeptly handle confidential information and sensitive situations
- Solid knowledge of technical concepts, hardware features and usage, cloud environments
- Advanced skills across the Microsoft applications suite – Teams, Excel, Word, Outlook, PowerPoint
- Knowledge of Tamarac (CRM), Schwab Institutional website a plus
- Knowledge of, and strict adherence to, the Firm's compliance policies and procedures
- Ability to work beyond standard office hours, as necessary
- Ability to travel between offices, typically in Maine and New Hampshire

EDUCATION AND EXPERIENCE

- College Degree in Information Technology, Computer Science or related field a plus
- Minimum 2-5 years IT experience – ideal candidate worked as part of a larger IT team and/or has done helpdesk support previously, track record of supporting/maintaining integrity of IT structure
- Experience in finance industry preferred
- Experience working with technology infrastructure in a regulated environment preferred
- Experience managing cybersecurity policies/execution is a plus
- Experience with Apple products is a plus

WHY WORK AT VIGILANT CAPITAL MANAGEMENT:

- Fantastic office locations in downtown Portland, ME and Portsmouth, NH
- Very competitive salary and bonus plan
- Excellent benefits
    - Employer-paid employee health insurance and HSA contribution
    - Employer-paid employee dental and vision plan
    - Employer-paid life and disability plans
    - Profit-sharing, with exclusive company-managed investment option
- Generous PTO plan
- Bi-annual company events
- …. And more

NO PHONE CALLS OR RECRUITERS PLEASE

Vigilant Capital Management is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, sexual orientation, gender identity, national origin, disability, veteran status, or any other status protected by law.