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## **JOB DESCRIPTION FOR THE POSITION OF:**

### ***Human Resources Manager***

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#### **Who We Are:**

Since 2003, Vance Wealth has served as a premier financial planning practice passionately committed to helping our families and businesses succeed at every step of their financial journey. It's a commitment that starts with carefully listening to their goals and making their priorities our own. We aim to take care of clients like family, working tirelessly to establish a blueprint for today with a vision of tomorrow, and helping provide the confidence they need to make their dreams a reality.

We pride ourselves on our client care philosophy. Vance Wealth will be by our client's side through all of life's challenges, guiding them through the most difficult of times and empowering them during the best of times. Whether advising on our client's everyday spending, retirement planning, investments, tax strategies, insurance, college savings or any other financial need, we're committed to providing them the confidence and knowledge needed to be prepared for life's uncertainties.

Providing client-centric solutions, backed by years of financial planning expertise, is not an accident. In an ever-changing world and a constantly evolving economy, we are always seeking ways to stay abreast through continuing education opportunities in the financial industry, the markets, and specific investments. What's more, we have a strong presence in our community providing education to both the public and professionals alike, through seminars, workshops, and other speaking engagements. It's a responsibility we passionately embrace every day. It means paying our experience forward at every opportunity and providing clarity when it's needed the most.

#### **Position Description**

The position of Human Resource Manager is a multi-faceted position with an emphasis on internal branch operations supporting the CEO and COO, with a focus on human resources, administration supervision, and projects.

#### **Managing Relationship:**

- Direct reports to Chris Pelch, COO

Position Type: **Full-Time**

Expected Hours of Work: **Monday-Friday 8am-5pm**

#### **EXPERIENCE AND REQUIRED SKILLS**

- Minimum 2- 4 years' experience in human resources with Benefits Administration and HR management experience preferred
- Demonstrated experience with HRIS systems preferred
- Paylocity experience is a plus

## EDUCATION

- Bachelor's Degree in Business Administration, Human Resources or similar or related field preferred

## Essential Functions

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. Employee Recruitment & Onboarding
  - a. Responsible for managing the employee recruitment process including:
    - i. Collaborate with hiring manager/team to develop job description
    - ii. Coordinating with the firm's marketing team to advertise open positions
    - iii. Gathering and screening applications to identify good fits (for the job and for Vance Wealth's culture)
    - iv. Conducting initial interviews with applicants and move qualified candidates to the next round
    - v. Managing and scheduling ensuing interviews
    - vi. Participating in discussions for the hiring of new employees
  - b. Master behavioral interviewing as a tool for identifying qualified candidates and train other members of the team at Vance Wealth to successfully use behavioral interviewing.
  - c. Once a hiring decision is made, manage the onboarding process including:
    - i. Gathering all necessary documents from the new employee and running background checks
    - ii. Establishing an employee onboarding schedule consistent with Vance Wealth's approach to employee onboarding
    - iii. Coordinating with members of the hiring team/department to prepare for the employee's first day
    - iv. Completing the Post-hire checklist and coordinating with all appropriate parties including outside vendors
    - v. Orchestrating consistent check-ins with new hires for constructive feedback and to ensure that they are on a path to success at Vance Wealth
2. Employee Development
  - a. Work closely with the Leadership Team to create an employee development framework that allows team members to grow their careers at Vance Wealth
  - b. Assist in the implementation of this framework, tracking employee progress towards goals (individual and company)
  - c. Manage a budget for employee development opportunities and work with each employee to find ways to improve their skills/learning experiences
  - d. Serve as the firm's Expert on HireSense assessments. This includes interpreting results, identifying strengths and weaknesses for each member of the team, providing coaching to team members, as well as guidance/coaching to the Leadership Team
3. Employee Review Process
  - a. Monitor and schedule employee review to coincide with their anniversary dates
  - b. Communicate with employees and members of the leadership team to prepare for meetings
  - c. Create reports for employees and management including surveys, benefit summaries, and annual review dashboards
  - d. Run a peer evaluation process to provide feedback to team members on their performance, areas of strength, and areas of improvement
  - e. Work with the team to update job descriptions on an annual basis; so that they reflect the responsibilities of the team

4. Employee Terminations
  - a. Assist with all items related to the termination of employees. This may include:
    - i. Final payroll processing
    - ii. Payout of PTO to terminated employee
    - iii. Preparation of letters, documentation, and severance packages
    - iv. Implementing the terminated employee checklist and removing employee from all systems and internal licenses
5. Paylocity System Expert
  - a. Vance Wealth utilizes Paylocity as our online payroll and human resources solution.
  - b. The Human Resources Manager is expected to be an expert on Paylocity's tools and to provide recommendations to the Leadership Team for how we can best leverage those tools
  - c. Provide reporting to the COO and Leadership Team out of Paylocity to assist in the decision making of the firm
6. Compensation:
  - a. Oversee the team's compensation planning process working closely with the firm's President and COO
  - b. Participate in compensation reviews with employees and other members of the leadership team
  - c. Track individual and team-based incentive plans to ensure that they are accurate and paid on time
  - d. Payroll - Run bi-weekly payroll to ensure that all team members are paid accurately and on time
  - e. Payroll - Provide reporting to COO with summary details on compensation, PTO, OT, etc.
  - f. Manage the President's payroll and monthly administrative tasks
7. Employee Benefits:
  - a. Manage the firm's benefits package and work with appropriate third parties
  - b. Benefits include 401k Plan, Medical, Dental, Vision, Other Insurance, Cell Phone, and PTO
  - c. Gather and provide census reporting documentation to external vendors to ensure Vance Wealth remains compliant
  - d. Manage EED claims, filings, and documentation
8. Other Business Insurance:
  - a. Coordinate with third party business insurance providers including worker's comp, business liability, and more
  - b. Assist with the gathering of necessary data for insurance reviews.
9. System/Process Documentation
  - a. Responsible for documenting all processes using our firm's intranet software (Guru).
  - b. When a process does not exist, we expect this person to create one
  - c. Where a process is outdated, we expect this person to verify the correct process and update in Guru.
10. Note Taking & Organization
  - a. Maintain thorough notes from conversations with others on the team and translate those notes into action items in the firm's CRM
  - b. Respond to emails and team messages in a timely fashion.
  - c. Time block calendar and maintain clear and open communication with the COO as it your workload and priorities

DUTIES AND TASKS ARE SUBJECT TO CHANGE. SOMETIMES ADDITIONAL DUTIES AND RESPONSIBILITIES ARE ASSIGNED TO ASSIST WITH OTHER DEPARTMENTS. WE ASK YOU TO BE FLEXIBLE WITH THE DUTIES ON THIS LIST.

### **Abilities & Competencies**

To perform the essential function of this position, the incumbent regularly employs the following communication and reasoning abilities and competencies:

- Effectively reads and comprehends written English
- Effectively understands, speaks, and writes English
- Able to multitask under tight deadlines
- Able to actively and attentively listen
- Able to think through, evaluate and solve problems logically
- Able to organize work effectively in order to meet deadlines
- Attentive to detail
- Conduct all matters in a professional and courteous manner
- Collaborate and coordinate with workers and other departments

### **Performance of the essential functions involves the following physical and/or sensory abilities:**

- Frequently using hands to manipulate equipment or media
- Frequently typing on a keyboard
- Frequently sitting and performing deskwork
- Seeing and reading without difficulty (with or without personal corrective aides)
- Able to manipulate data on computer screens and other digital devices.
- Ability to do math problems and analyze data.
- Frequently interacting and communicating either in writing or verbally with clients or co-workers.
- (If any jobs require lifting or moving items include those)

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