



**Meradia Group, Inc.** is a premier provider of advisory and implementation services to the mid- and large-market of the investment services industry. Meradia Group seeks to attract and retain a team of ambitious, competitive and talented consultants committed to providing a differentiating level of service to Meradia and our clients. For more information about Meradia Group please visit [www.meradia.com](http://www.meradia.com).

Meradia Group presently seeks to add a **Lead Strategic Consultant** to serve a leadership role in the delivery of services to both existing and new client relationships. This individual will manage Meradia's consulting practice in the local market. The individual will:

- Manage and extend existing service relationships with clients in the target market.
- Identify, qualify and close new service relationships with prospective clients in the target market.
- Lead Meradia project team(s) to ensure that services are performed and delivered in accordance with client expectations, timelines and project budgets.
- Lead the delivery of Meradia's strategic services to all clients in local market (see Consulting Responsibilities).
- Coordinate the delivery of Meradia's tactical services to all clients in local market.
- Support Meradia consultants deployed at all clients in local market.

### **Consulting Requirements**

- Provide extensive strategic consulting to Meradia clients on potential functional enhancements and internal operating initiatives. Develop detailed Return on Investment and Business Case Analyses to support strategic recommendations.
- Provide Meradia's clients with functional guidance, advice and leadership through the successful selection and conversion to new reporting, data warehouse, portfolio accounting, client billing, portfolio management, and trade order management systems.
- Design, specify and select services, tools and systems to satisfy client's business objectives and requirements.
- Design, document and strategically plan for the implementation of workflow and operational structures necessary to centralize redundant functional groups.
- Develop and maintain internal and client communication including milestones documentation, status memos, procedural and operational documentation.
- Coordinate internal, external and client resources to plan, document and manage strategic phases of project.
- Facilitate communication between Meradia and clients. Schedule and lead client meetings and presentations, provide clients with detailed status reports, and effectively manage client expectations around specific project work.

### **Skills and Abilities**

- Diverse and strong functional knowledge of the investment services industry, particularly in the areas of front- and middle-office operations.
- Experience leading projects that impact multiple departments or entities within an organization.
- Ability to assess and document business needs: including systems; work flows; staffing; and the economic impact of each.
- Ability to reconcile the demands of large clients with available resources and schedules.
- Excellent interpersonal, verbal and written communication skills.
- Strong relationship management and business development skills.

- Fundamental project planning and project management skills.
- Strong analytical and business skills.
- Senior and authoritative presence.

### **Knowledge and Experience**

Since this position requires that the candidate have strong functional and industry knowledge, the following skills are important. Technical and computer skills are less important.

- Knowledge of front- and middle-office operations in investment advisory organization.
- Detailed knowledge of a broad range of financial instruments, investment securities and the capital markets.
- The combination of strong functional, technical, and operational knowledge of the financial services industry.
- Related degree from an accredited institution.
- Minimum of 8 years of experience in the brokerage, custodian bank or investment services industry.
- CFA or Series 7 license preferred but not required.

Send resumes to [jobs@meradia.com](mailto:jobs@meradia.com).