



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.

Meradia Group presently seeks to add a **Strategic Consultant** to serve a leadership role in the delivery of services to both existing and new client relationships.

Requirements

- Provide Meradia's clients with functional guidance, advisory 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 facilitate customized yet scalable client, marketing and management reports.
- Provide extensive strategic consulting to Meradia clients on potential functional enhancements and internal operating initiatives. Develop detailed Return on Investment and Cost/Benefit Analyses to support strategic recommendations.
- Design, document and strategically plan for the implementation of workflow and operational structures necessary to centralization of 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

- Strong functional knowledge of the investment services industry, particularly in the areas of front and middle-office operations.
- Experience managing systems and development 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.
- Experience with Advent Geneva, Eagle Pace and DSTi Performance solutions preferred.
- Fundamental project planning and project management skills.
- Strong analytical and business skills.

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 back office operations in investment advisory organization.
- Knowledge of multi-currency portfolio accounting.
- 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 5 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.