November 2026

DIRECTOR of OPERATIONS

PITON WEALTH
11257 W. Clearwater Ave.
Kennewick, WA 99336
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pitonwealth.com

Piton Wealth specializes in financial planning and investment management, with two offices, the main office in Kennewick, WA, and a growing office in Kalispell, MT, while serving clients virtually in many locations. We are now accepting application for this position. Interviews will continue until the position is filled.

JOB OVERVIEW

The Director of Operations at Piton Wealth manages the firm's operations team members, comprising a Front Office team and those supporting Piton's Wealth Advisors, along with leading the firm's growth broadly while serving our clients with the utmost professionalism. We anticipate this Director will come to take on further executive and administrative leadership of the firm.

RESPONSIBILITIES

- Regularly meet with CEO to understand near- and long-term business goals and objectives.
- Develop updated business plan:
    - Review existing business plan and update as necessary.
    - Assist CEO in developing 5- and 10-year goals and strategies on how to achieve them.
- Develop and execute new marketing plan
    - Review existing plan and develop new strategy going forward.
    - Utilize existing marketing team.
    - Increase community engagement.
- Coach Wealth Advisors:
    - Develop individualized plans for each Advisor.
    - Hold regular meetings to help them achieve their goals.
    - Track Advisor performance based on agreed-upon metrics.
- Coach support team
    - Meet with support team members to help create a customized career development plan for each team member.

    - Understand how each team member fits into the team and what can be done to maximize their contribution.
- Manage Client Advisory Team
    - Meet with the Client Advisory Team quarterly and guide implementing their recommendations where appropriate
    - Develop agenda and plan on how to use this Team most effectively
- Work full-time out of the Kennewick office with regular trips to the Kalispell office.
- Recruit new Wealth Advisors
- Recruit new support team members as needed

The successful candidate will be someone experienced in the financial planning profession, with a track record of leadership with measurable growth outcomes. Compensation for this position will include a competitive base salary + potential quarterly bonuses based on metrics such as net new money, qualified new clients and advisor recruitment.

APPLY by submitting cover letter & resume to **team@pitonwealth.com**.