

Employment Opportunity

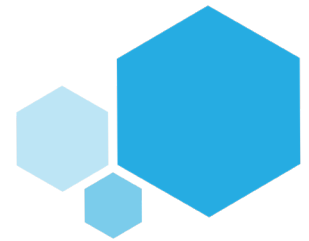
Director of Operations Resonant Capital Advisors Madison, WI



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ABOUT THE ORGANIZATION



[Resonant Capital Advisors](#) an independent, employee-owned Registered Investment Advisory (RIA) firm serving business owners and high-net-worth families through integrated wealth management, investment, and advisory solutions. Since its founding in 2018, Resonant Capital Advisors has experienced significant organic growth. The RIA firm operates within a broader holding company structure (“Resonant”), alongside a rapidly growing tax advisory affiliate, creating a uniquely integrated platform and long-term growth opportunity.



“Resonant’s process is built on decades of experience working with clients. It marries the individual and the technical, the personal with the analytical. We start by understanding your needs, and by building out a comprehensive financial plan for you and your family.”

ABOUT THE OPPORTUNITY



The Role:

Resonant Capital Advisors is seeking a Director of Operations to lead and scale non-investment operations across the firm. This is a high-impact leadership role focused on technology-enabled operations, client service infrastructure, and operational excellence. The position is designed with clear runway to a future COO role, either within the RIA or across the broader enterprise, for a candidate who demonstrates the ability to lead at scale and drive enterprise-wide initiatives.

This individual will serve as a strategic operator and technology leader, partnering closely with executive leadership while owning day-to-day operations, systems integration, and process optimization. The ideal candidate thrives in a fast-growing, entrepreneurial environment and is excited to help build the operational foundation for the next phase of growth.

Key Responsibilities:

- Oversee all day-to-day operational activities that support the firm's ability to deliver exceptional client experiences
- Lead non-investment operations, including client service platforms, reporting infrastructure, and operational workflows
- Serve as a technology-forward operations leader, owning the firm's technology ecosystem (CRM, reporting, custodial, and integrated platforms) while shaping and executing the roadmap across data integration, automation, cybersecurity, and AI enablement
- Drive technology strategy and execution, leading system integrations, optimizing data architecture, and identifying and implementing scalable solutions that enhance efficiency, client experience, and firm-wide growth
- Partner with and lead internal operations staff to ensure effective execution of daily functions
- Serve as a key partner to senior leadership, including the COO, CFO, CCO, Director of Investment Operations, and Client Service leadership
- Develop, implement, and continuously refine standard operating procedures, workflows, and system documentation, embedding them into CRM and operational processes
- Ensure all transaction processing and operational activities adhere to internal procedures and regulatory compliance requirements
- Create and deliver internal reporting packages to monitor KPIs and operational performance for executive stakeholders
- Oversee third-party vendor relationships, including due diligence and performance management
- Provide leadership, coaching, and development for team members, fostering a high-performance, client-centric culture
- Collaborate cross-functionally with client service, advisory, and investment teams to ensure alignment and operational excellence
- Communicate policies, procedures, and operational updates across all levels of the firm

Required Experience

- 5+ years of operations experience in a wealth management or financial services firm with expertise across non-investment operations, technology and compliance; RIA firm experience highly preferred
- 2+ years of experience leading high-performing teams, with demonstrated success in coaching, development, and performance management
- Deep understanding of compliance requirements within an RIA environment and a commitment to fiduciary standards
- Bachelor's degree preferred, or equivalent professional experience

Skills & Capabilities:

- Deep expertise in technology platforms and integrations within a modern RIA (e.g., Salesforce, Addepar, custodial platforms such as Schwab/Fidelity, financial planning and reporting tools)
- Exceptional communication skills with the ability to influence across technical and non-technical stakeholders
- Track record leading technology integration, system optimization, and operational scaling initiatives
- Experience operating in a fast-growing, entrepreneurial firm, with the ability to build structure while maintaining agility
- Experience developing and documenting scalable processes, policies, and procedures
- Proven change management skills with the ability to drive adoption of new systems, processes, and tools to optimize workflows and prioritize effectively across complex systems and processes
- Exposure to data strategy, AI enablement, or advanced analytics initiatives is highly preferred
- High level of personal and professional integrity, with a focus on compliance, risk management, and operational excellence

Future Growth Opportunity:

The Director of Operations role at Resonant Capital Advisors offers a unique opportunity to help scale a high-growth, technology-forward RIA while building toward executive leadership. The successful candidate will play a critical role in increasing operational capacity and efficiency as the firm continues its rapid expansion, with potential to progress into a COO role within the RIA and/or expand influence across Resonant's broader holding company and affiliated businesses. This Director of Operations is ideal for an operations leader who is ready to take the next step—whether stepping into broader enterprise leadership, taking on additional strategic responsibilities across technology or business initiatives, or driving impactful change in a dynamic environment. Resonant provides meaningful exposure to senior leadership, involvement in strategic initiatives, and access to professional development and networking opportunities. Progression in scope, responsibility, and compensation will be tied to performance, with long-term upside that may include participation in equity or ownership programs. For an ambitious, tech-savvy operator, this is a high-impact role with significant vertical and horizontal growth potential in a firm serving some of the most sophisticated clients in the region.

The QTI Group is exclusively retained to partner with Resonant Capital Advisors in the recruitment of this key leadership role. For immediate consideration, please apply directly at <https://www.qtigroup.com/find-a-job/details/director-of-operations/NM207354521> or contact Nicki McCurdy, Sr Recruiting Director, at nicki.mccurdy@qtigroup.com.