

Job Opening – Onboarding Specialist

Vector is a fund administrator and technology company that services closed-end investment funds, primarily in the venture, private equity, real estate and digital asset spaces. We provide alternative asset managers with solutions for fund accounting and reporting, operational support and investor relations. We are currently developing what we believe is the most exciting software roadmap in the industry in an effort to streamline the experience of all stakeholders in alternative investments, including our employees.

Our company is a place where excellent talent can thrive. We offer work that is progressive and fulfilling. And we are hyper-focused on workflow engineering, so you can spend your time on tasks that matter to you. We offer competitive salaries, industry-leading benefits packages, including unlimited PTO, and incentive compensation packages that are unmatched in the industry.

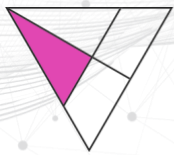
Job Description

The **Onboarding Specialist** role is instrumental to Vector's success. The Onboarding Specialist will be the primary client-facing contact responsible for the successful handoff from the sales team post-contract execution to the client engagement team. This is the first hire for the onboarding team, and this position will shape the role and ultimately the team. So there is lots of growth potential! At a minimum, the Onboarding Specialist will:

- Collaborate with the sales team and ensure a seamless handoff post-contract signature.
- Be the primary point of contact for both the client and the client's engagement team through implementation.
- Be responsible for the seamless and successful onboarding of each new client.
- Demonstrate exceptional organizational skills and ability to communicate updates and changes to different internal teams and clients.
- Analyze client's data and provide the necessary recommendations for a successful launch.
- Complete the internal processes to ensure the client's information is correctly transmitted to the correct teams.
- Follow up with the sales team and the client engagement team on platform access, onboarding items and validation of information received from the client.
- Organize tasks and deliverables, and meet commitments on time.
- Actively communicate the status of work with other team members to ensure that everyone involved is fully informed, and if necessary re-allocate work.

Specific tasks include, but are not limited to:

- Liaison with accounting team to ensure proper billing setup upon contract execution.
- Liaison with IT group to set up appropriate emails, Sharepoint sites, distribution lists, etc.



- Creation and dissemination of tailored document request lists.
- Coordination of internal and external resources to deliver appropriate scope of services.
- Monitor and review of documentation provided by clients.
- Assistance with fund close processes, including, but not limited to:
 - Liaison with external partners involved in subscription document review.
 - Conducting AML/KYC checks on client investors.
- Initial Setup of documents and infrastructure needed to support ongoing client engagements:
 - Setup of investor portal.
 - Establish SharePoint folder structure.
 - Setup template documents, including capital call notices, accounting database, workbooks, statements, etc.

Job Location

This is a remote position. You can work from home, or we will cover the cost of a co-working space in your area.

Qualifications

- Bachelor's degree or 3+ years professional experience.
- Ability to multi-task and reprioritize as time critical issues arise.
- Strong attention to detail in a dynamic, fast-paced environment.
- Good interpersonal and communication skills are required.
- Not afraid to speak up and question existing processes.
- Project management certification or desire to pursue a project management certification (at Vector's expense).

As an early-stage company, Vector provides no shortage of special projects and new opportunities for growth, so the ideal candidate is ambitious, eager to grow and a team player. We want all of our employees to be invested in and rewarded by the success of the company. Our standards of practice are high and we respect each other's time.

Applicants should submit their resume to humanresources@vectorais.com.

EEOC: Vector offers equal employment opportunity to all, regardless of their race, creed, religion, gender, age, sexual orientation, national origin, disability, veteran status or any other characteristic protected by state, federal, or local law.