

Job Title: Chief Operating Officer (COO)
Company: Bare Wealth Advisors
Location: Gap, PA
Industry: Registered Investment Advisor (RIA)
Reports to: CEO
Submit Resumes to: ron@barewealthadvisors.com



Company Overview:

Bare Wealth Advisors provides wealth management grounded in Biblical wisdom to encourage generosity, empower vision, and influence the world for good. A dynamic and forward-thinking Registered Investment Advisor (RIA) dedicated to providing exceptional financial planning and investment management services. Our goal is to simplify wealth management, offering personalized strategies that help clients achieve their financial goals while fostering lasting relationships built on trust, integrity, and expertise.

Position Overview:

Bare Wealth Advisors is seeking a highly skilled, results-oriented Chief Operating Officer (COO) to oversee and optimize the firm's day-to-day operations. This executive will be instrumental in driving operational efficiency, supporting our strategic vision, and ensuring the organization delivers top-tier service to our clients. The COO will work closely with the CEO and leadership team to improve internal processes and scale the operations to meet the evolving needs of our growing business.

Key Responsibilities:

1. Operational Leadership:

- Oversee daily operations across all functional areas of the firm, including client service, financial planning, investment management, compliance, and technology.
- Identify and implement operational efficiencies, process improvements, and best practices to streamline workflows and improve client satisfaction.
- Manage and mentor a cross-functional team, fostering a culture of collaboration, accountability, and professional growth.
- Ensure an exceptional, seamless client experience by refining back-office processes, workflows, and communication strategies.

2. Strategic Planning & Execution:

- Collaborate with the CEO and leadership team to develop and execute the firm's strategic vision, ensuring alignment with long-term objectives.
- Monitor progress of strategic initiatives, providing regular updates to leadership on key performance indicators (KPIs) and operational outcomes.
- Support the operational and HR execution of new business initiatives, partnerships, and growth opportunities.

3. **Human Resources:**

- Lead and develop Human Resources department
- Lead efforts in talent recruitment, development, and retention, ensuring the firm attracts and retains top-tier talent in operations, client service, and other key areas.
- Foster a positive company culture with a focus on living our cultural values of humble, hungry and aware.

4. **Compliance & Risk Management:**

- Work closely with the CCO to ensure the firm's risk management protocols and internal controls safeguard assets, operations, and client relationships.

5. **Technology & Infrastructure:**

- Help drive technology strategy to ensure the firm's systems are efficient, secure, and scalable (CRM, M365, IT Support firm).
- Help oversee the firm's infrastructure, ensuring that systems, processes, and teams are aligned to support growth and operational excellence.

Qualifications:

- Bachelor's degree in Business Administration, Finance, or a related field; MBA or advanced degree preferred.
- Minimum of 7-10 years of leadership experience in operations management and/or Human Resources.
- Proven track record of driving operational excellence, managing cross-functional teams, and executing on strategic business initiatives.
- Exceptional leadership, communication, and problem-solving skills.
- Ability to thrive in a fast-paced, growth-oriented environment while maintaining focus on quality and client outcomes.

This job description is intended to outline the general duties and responsibilities of the COO role and is not an exhaustive list of tasks. The COO may be required to perform additional duties as necessary to support the success of Bare Wealth Advisors.