



HALBERT HARGROVE

Technology & Compliance Specialist

About Halbert Hargrove

Halbert Hargrove is a fee-only firm who provides a proven, goals-directed planning process for wealthy families and individuals. Our wealth advisory and fiduciary investment services help our clients preserve and grow their wealth through access to preferred investment vehicles, extensive market experience, and proven strategies that we've continually refined since our founding in 1933.

Halbert Hargrove is recognized as one of the top wealth advisory firms in the country; our successful client relationships are due in no small part to our commitment to transparency, fiduciary best practices, and innovative culture.

About the Technology & Compliance Specialist

The Technology and Compliance Specialist provides IT support for both in-office and remote employees, ensuring timely resolution of technical issues. This role supports operations by troubleshooting devices and software, maintaining accurate system data and ensuring department and company compliance. The Technology & Compliance Specialist is also responsible for training employees and developing resources to improve technology use and efficiency across the company.

Work Location

This position is eligible for a hybrid work schedule with Tuesdays and Thursdays reporting from the office in Downtown Long Beach. Additional in-office days may be required for urgent tech support, events, meetings, etc.

Compensation & Benefits

The compensation for this position is \$65,000 - \$75,000. Benefits include:

- Medical insurance
- Dental and vision insurance
- Retirement plan
- Unlimited paid time off
- Paid sick leave
- Paid holidays
- Discretionary performance-based merit bonus
- Profit sharing
- Childcare match
- Professional development budget for continuing education credits, conferences and training
- Health and wellness reimbursement
- 529 plan match

Essential Position Responsibilities Include:

- Provide first-line support for in-office and remote IT issues.

- Perform troubleshooting by asking diagnostic questions to identify and resolve technical issues promptly.
- Triage and prioritize help desk tickets, responding to inquiries and escalating tickets.
- Ensure all issues are addressed in a timely manner for devices including computer hardware/software, printers, internet/Wi-Fi and mobile devices.
- Coordinate with the IT consultant on broader issues that cannot be resolved in-house.
- Provide associates with clear and thorough timely responses and follow up until completion.
- Work closely with Director of IT/Cybersecurity to ensure compliance with evolving trends and regulations.
- Create training videos and knowledge base and keep updated IT procedures to enhance efficiency.
- Train new associates on proper systems use and configuration.
- Work closely with Chief Compliance Officer to ensure that all systems used are monitored regularly and are in compliance, including regulatory filing, firm documentation and training.
- Help maintain, update and audit system data while maintaining the accuracy of all client information.
- Other responsibilities as assigned.

Qualifications:

- At least one year experience in a technical support role or one year of customer service experience preferred.
- Knowledge of Windows operating system and Microsoft Office Suite.
- Strong IT troubleshooting/problem-solving skills.
- Intermediate software and hardware experience with PCs, iOS and Android devices.
- Basic understanding of networking, additional experience is beneficial.
- Ability to manage multiple projects with competing deadlines.
- High level of attention to detail and follow through.
- Strong interpersonal, written and verbal communication skills.
- Integrity and the ability to keep information confidential.
- Strong analytical and quantitative skills.
- Familiarity with AI.
- Bachelor's Degree preferred.

How to Apply

Thank you for your interest in the Technology and Compliance Specialist opportunity with Halbert Hargrove! Please submit your resume and cover letter for consideration here: [Halbert Hargrove Technology And Compliance Specialist Job Long Beach](#). We are unable to accept direct inquiries about this position (i.e. phone calls, emails).