WINTHROP WEALTH

Technology Operations Lead

Location: Boston, MA. Hybrid or Remote. Preferred in-office full-time for the first 90 days, transitioning to a hybrid schedule of four days on-site and one remote day per week thereafter.

Target Compensation: On-target earnings (OTE) of $125,000 to $175,000, including a base salary of $125,000 to $155,000 and a target annual bonus of up to $20,000.

Reports To: Michael Banchick, Chief Technology Officer

Job Summary

Join Winthrop Wealth as our Technology Operations Lead, a hands-on role focused on making our systems, workflows, and support processes more reliable, documented, and scalable as we build to scale in 2026. You will sit at the intersection of technology, operations, compliance, and client service, translating the firm's day-to-day needs into clean processes, sound documentation, and dependable systems.

This isn't a role where you disappear into a ticket queue. It's ownership of the operational backbone that lets advisors and staff deliver an excellent client experience without technology getting in the way.

You will be the first technology hire after our CTO, working closely with him to stand up the function, operate within our Agile delivery framework, manage our IT vendor relationship day to day, and be a visible, trusted presence for the people who depend on these systems every day. If you like solving problems close to the work, building order out of ambiguity, and being the person people go to when something needs to get fixed or figured out, this role is built for you.

Responsibilities

As our Technology Operations Lead, you will:

Own and improve core technology operations by:

- Serving as the day-to-day owner of operational technology workflows across Microsoft 365, SharePoint, Teams, Salesforce, and other firm systems
- Managing the day-to-day relationship with VIP IT, our managed service provider, including ticket routing, escalation, and holding them accountable to the response times and fixes they own
- Triaging technology issues as they arise, engaging VIP IT for hands-on resolution, and keeping stakeholders informed while an issue is being worked
- Maintaining clean system documentation, access records, configuration notes, and operating procedures so the firm can support growth, audits, and continuity
- Supporting onboarding, offboarding, permission changes, device coordination, and user access workflows with accuracy and appropriate control

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- Providing hands-on, in-person technology support to firm leadership and staff for everyday needs, understanding that being visibly present and responsive is as much a part of this job as the fix itself

Build scalable processes and documentation by:

- Partnering with the CTO, Compliance, Operations, and advisory teams to document repeatable workflows from intake through completion
- Creating clear SOPs, checklists, escalation paths, and training materials that new team members can follow without relying on informal tribal knowledge
- Testing and validating the effectiveness of the firm's data security policies and Business Continuity and Disaster Recovery plan in partnership with Compliance, reporting findings and gaps rather than authoring or enforcing policy directly
- Converting the firm's business analyst's process maps into build backlogs, rather than mapping current-state processes from scratch, and flagging gaps back to the business analyst when the mapping doesn't match what's actually happening on the ground
- Building light automation and configuration, such as Power Automate flows and Salesforce process changes, that removes manual steps from everyday workflows
- Administering the firm's AI platform seats, including Microsoft, Anthropic, and OpenAI: allocation, single sign-on, retention settings, and enforcing and maintaining acceptable-use monitoring under the firm's written information security program, with Compliance retaining policy oversight
- Playing an active role in the firm's adoption of AI tools, including testing, implementing, and training teammates on AI-assisted workflows that reduce manual effort and increase operational throughput

Coordinate across teams, vendors, and incidents by:

- Owning the day-to-day working relationship with VIP IT, while the CTO retains ownership of the vendor relationship itself, including contract terms, performance accountability, and renewal decisions
- Serving as the point of coordination during technology incidents, orchestrating remediation between VIP IT, internal stakeholders, and the CTO, and communicating status and next steps as issues are resolved
- Helping build and maintain a clear incident response protocol with the CTO and Compliance, so the firm knows exactly who does what when something breaks
- Serving as part of the firm's after-hours coverage model by triaging severity and marshalling the right resources, whether internal or through VIP IT, particularly during high-risk windows such as pre-market hours, month-end processing, tax season, and system changes
- Collaborating with cross-functional teams to set timelines and provide status updates, decision points, and action lists that create shared awareness of an initiative's progress, and partnering with stakeholders to define an initiative's Definition of Done and prioritize it using business value, time criticality, and risk reduction

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- Contributing hands-on execution, including data pipeline runs, reconciliation, and partner and platform proofs of concept, to the firm's larger platform-transition projects, such as a firm-owned data lake and a CRM platform evaluation
- Serving as the named backup for two of the firm's Jira governance seats, the Cadence Facilitator (Scrum Master) role and the Portfolio Product Owner role, including running Sprint Planning, Standup, and Retro when called on

Support the team through training and knowledge-sharing by:

- Helping train team members on new or improved workflows through concise guides, live support, office hours, and practical examples
- Acting as a practical liaison between business users and VIP IT to ensure issues are understood, assigned, resolved, and documented
- Contributing to the CTO's broader technology roadmap by flagging recurring friction points and translating them into documented improvement, automation, or training opportunities

Role Scope & Performance

The Technology Operations Lead will be measured by the reliability, clarity, and scalability of the systems and processes they support, and by how visible and dependable they are to the people who rely on them day to day. Success in this role looks like faster issue resolution, cleaner documentation, fewer recurring workflow breakdowns, a well-managed VIP IT relationship, and a team and leadership group that trusts technology is being handled consistently.

This is a hands-on role with real visibility across the firm. The right person will move comfortably between fixing something for a partner at their desk, documenting a process, and coordinating an incident response, sometimes in the same day. The target start date is as soon as practicable, based on candidate availability.

Key Success Metrics

- VIP IT ticket resolution time and adherence to agreed response windows
- Percentage of core technology workflows documented as SOPs
- Results of periodic BCP/DR test cycles and time to close identified gaps
- Reduction in recurring, previously undocumented issues
- Feedback from staff and leadership on responsiveness and day-to-day support
- Accuracy and timeliness of onboarding, offboarding, and access changes

Career Pathways

The growth path for this role is tied to impact, ownership, and trust. As the first technology hire after the CTO, you will help build this function from the ground up, working directly with Michael

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to establish how technology operations run at Winthrop Wealth. That means real influence over the systems, processes, and standards you'll eventually be measured against.

As our technology function grows, this role is positioned to grow into a Director of Technology Operations, with the CTO continuing to own architecture and strategy. Growth here doesn't have to wait on a traditional hiring budget. The firm already treats AI agents as a defined part of its workforce, each with its own scoped charter and clear accountability, and this role is expected to build and lead that digital team from day one, designing the charters, assigning the scope, and owning the outcomes, well before any human report is added. Today, human headcount for this function is zero and unbudgeted. We'd rather tell you that plainly than oversell a guarantee, but running a real team, even one built from AI agents rather than people, is genuine leadership scope available from the start.

This position offers direct exposure to firm leadership and cross-functional work across Advisory, Operations, Compliance, and Client Service. That visibility creates a strong development platform for someone who wants to help build the operating infrastructure of a growing wealth management firm.

This role may be the one for you if:

- You are as comfortable fixing something in person for a partner as you are documenting a process no one has written down before
- You are curious about AI and genuinely excited to apply it in practical, meaningful ways
- You are energized by making systems, processes, and handoffs cleaner, clearer, and easier for others to follow
- You are highly organized and can manage multiple open items without losing track of owners, deadlines, risks, or decisions needed
- You write clearly and believe documentation is part of doing the work, not an afterthought
- You are comfortable asking detailed questions until a process is clear enough for someone else to execute consistently
- You understand that technology operations in a wealth management firm must balance speed, usability, security, compliance, and client experience
- You are results oriented, resourceful, and thrive without micromanagement
- You take ownership of your work and continuously strive for excellence

Qualifications

- 5+ years of progressive experience in technology operations, systems administration, or IT operations. Candidates with 4+ years may be considered given unusually strong, proven experience in a regulated industry and a demonstrated track record building on frontier AI models and adjacent tools
- 2+ years of experience working within a managed enterprise environment, such as a regulated financial services firm, MSP, or other organization with formal IT governance

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- Deep, hands-on Microsoft 365 administration, including Exchange Online, SharePoint, Teams, licensing, and tenant configuration across multiple domains
- Entra ID experience, including user and group administration, app registrations, SSO/SAML configuration, and working knowledge of Conditional Access
- Intune and Autopilot experience, including device enrollment, compliance policy, configuration profiles, and update management
- PowerShell and Microsoft Graph scripting ability, with experience writing and troubleshooting automation, not just running it
- Expert-level Salesforce product knowledge and administration, including sandbox-to-production deployment, integrations, and ecosystem partner management, with hands-on experience optimizing permission sets, flows, page layouts, reports, and automations
- Demonstrated ability to document processes, identify gaps, coordinate stakeholders, and drive issues to resolution
- Excellent written and verbal communication skills, including the ability to translate technical detail into clear business language
- High attention to detail, strong follow-through, and comfort operating in a regulated environment where accuracy and recordkeeping matter
- Experience working with managed service providers, IT vendors, or implementation partners
- Bachelor's degree or equivalent professional experience

Bonus Points for:

- Familiarity with AI tools and AI-assisted workflows, and genuine enthusiasm for applying them to everyday operations
- Hands-on experience with frontier models and adjacent infrastructure, such as Azure OpenAI, local or open-weight inference tools like Ollama or llama.cpp, model registries, or cost-per-token tracking, is a plus as the firm's custom AI layer for advisor-facing workflows matures
- Practical experience operating AI tools or workflows in a production setting, including writing acceptance criteria and verifying results through end-to-end testing that is both modular and deterministic
- Familiarity with Salesforce Financial Services Cloud, Agentforce, Snowflake, eMoney, Addepar, or comparable platforms
- Relevant certifications, such as Microsoft Certified: Endpoint Administrator Associate (MD-102), MS-102, SC-300, or SC-200, or Salesforce Administrator certification
- Experience in regulated financial services (an RIA, broker-dealer, bank, or fintech), or in an MSP or consulting role serving those clients
- Exposure to business operations, workflow design, or process analysis, even without formal ownership of that function

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- Familiarity with Scrum or agile ceremonies (Sprint Planning, Standup, Retro)
- Experience improving onboarding, offboarding, access management, or internal knowledge management workflows
- Experience creating training materials, SOP libraries, or internal operating playbooks

Who We're Looking For

This role is a great fit for an operationally minded technology professional who likes solving practical problems close to the work, building repeatable systems, and being the person people trust to make things run. You do not need to be the deepest engineer in the room, but you do need to be curious, organized, persistent, and comfortable being visible. We welcome candidates from varied backgrounds, including technology, financial services, or operations, who bring the judgment and follow-through this role requires.

About Winthrop Wealth

Winthrop Wealth provides planning and advisory services to high-net-worth and ultra-high-net-worth individuals and families. The firm is headquartered in Boston, Massachusetts, and has advisors located in Westborough, Massachusetts, New York, New Hampshire, Connecticut, Washington State, and Arizona.

Winthrop Wealth seeks to deliver incredible client experience and consultation to help our clients live life to the fullest. Our love of results, appreciation of clients, and respect for one another makes Winthrop Wealth a fast-growing and innovative company with an incredibly strong culture, and in 2026, we are building to scale.

Winthrop Wealth is an equal opportunity employer and provides reasonable accommodations to applicants and employees in accordance with applicable law.

Industry

Financial Services