



Title: Accounts Receivable Specialist

Job Summary:

Westmount Partners, an investment advisory firm in Century City, is seeking an Accounts Receivable Specialist to join the team. Established in 1990, Westmount provides investment management and financial planning services to high-net-worth individuals and families, nonprofits, and pension plans. We are a steadily growing firm with 41 employees.

The primary purpose of the Accounts Receivable Specialist is to maximize cash inflows while optimizing efficiency and maintaining good client relationships. You will be responsible for streamlining client payments by monitoring AR metrics, improving collections strategies, and ensuring operational efficiency.

The Accounts Receivable Specialist will manage all aspects of financial reporting related to billing and coordinate with our outside vendors on financial, banking, and tax matters. This position will support the Director of Finance and Administration and collaborate with the part-time bookkeeper.

Responsibilities:

The primary responsibilities of the position are the following:

- Oversee Accounts Receivable functions;
- Manage client billing process;
- Develop and maintain standard operating procedures for the billing processes;
- Prepare and present weekly revenue reports, highlighting key metrics and performance indicators;
- Respond to daily inquiries from colleagues and clients;
- Assist with annual audits;
- Assist with corporate insurance policies and renewals in coordination with our insurance broker;
- Administer various financial activities related to our private equity funds;
- Maintain relationships with outside vendors, including our auditors, insurance broker, and the custodians of our client's assets;
- Obtain a Notary Public License and notarize client documents;
- Other duties as assigned.

Qualifications:

Success in this role depends on organization, collaboration, communication, process improvement, and the ability to work well within a rapidly changing business environment. The position requires the following:

- 5+ years of experience in financial reporting and general accounting roles with a professional services firm;
- Experience developing and implementing internal controls;
- Experience in implementing new software programs;
- Experience in data analysis supporting billing analytics;
- Strong written and oral communication skills;
- Demonstrated ability to prioritize and multi-task;

- Detail-oriented, with an ability to work both independently and collaboratively;
- Proactive problem solver;
- Positive attitude, professionalism, and strong work ethic with a high level of integrity;
- Proficiency in financial software and systems, with advanced Excel skills;
- Proficiency in MS Office Suite and an aptitude for quickly learning new software applications.

- ***Desirable:***
 - Experience in the financial services industry, preferably at a wealth management firm.