Boulder, CO - *Associate Advisor*

- For a video position description click here: https://youtu.be/ml5G7OFHD3w
- Email for a primary contact: candidate@newplannerrecruiting.com

What we are offering:

We are a boutique wealth management firm in Boulder, Colorado seeking a Associate Advisor to join our team. This is a professional position that will support the firm's lead advisors directly in managing existing and new client relationships. You will be expected to assist in various projects including portfolio reviews and preparing financial projections using Morningstar Office and Moneyguide Pro financial planning software. The ideal candidate will have a working knowledge of portfolio allocation and investment management. The lead advisor is available to provide mentoring and big picture direction, but you must have the ability to utilize critical thinking skills, work independently, and anticipate firm needs and client questions.

What you will get to do:

- Prepare financial plans and retirement projections
- Regularly monitor clients' financial situations with attention to detail and accuracy
- Participate in all aspects of pre-client meeting activities such as preparation of meeting agendas, client paperwork, Investment Policy Statements and asset allocations
- Perform post-client meeting tasks such as developing meeting notes, performing financial situation analyses, and coordinating planning implementation with outside professionals
- Assist with trading and rebalancing of client investment accounts
- Interact with clients over the phone and in-person to maintain client records in CRM and document management software
- Participate in firm project and staff meetings, or others as needed
- Facilitate efficient office operations including leading and assisting with process and system improvement projects
- Serve as backup for operational and administrative duties

What we seek in a candidate:

- B.A. or B.S. degree from accredited CFP Board registered financial planning program or equivalent experience
- CFP® certification or attainment within 18 months of employment
- Series 65 license or attainment within 3-6 months of employment
- Strong financial/analytical and verbal/written skills
- Strong persuasive and interpersonal skills
- Ability to identify, meet and follow through with client needs and requirements
- Show curiosity and confidence when dealing with clients and lead advisors
- Operates with a firm understanding of the fiduciary responsibility and with personal integrity
- Average knowledge of Microsoft Office Suite
- Specific experience working with TD Ameritrade, Junxure, Morningstar Office, Worldox Document Management and/or Moneyguide Pro is a plus

Position Perks:

- Base salary depends on experience but is estimated to be between $50-70k/yr and career track available
- 401K plan with a safe harbor matching contribution that is 100% vested
- Medical insurance – 50% employer paid
- Professional development budget for CE, local conferences and training

- Reimbursement for the CFP certification of $3000 if attained within the first 18 months of employment, if candidate doesn't have CFP certification
- Mentorship and learning opportunities
- Straightforward, professional and enjoyable work environment