AVIER
WEALTH ADVISORS

ASSOCIATE ADVISOR

Bellevue, WA

Client Service | Full-time

Avier is one of Bellevue's fastest growing financial advisory firms and we are looking to hire an Associate Advisor. Avier is committed to providing exceptional service to our clients and fostering a culture that values teamwork, honesty, and a desire to build deep relationships with our clients and one another. We truly enjoy the work we do and the people we get to work with. We believe in a healthy work life balance and we collaborate with team members to make sure work is accomplished. Avier focuses on the tech community and how to help local tech employees maximize the benefits available to them through their work.

We pride ourselves on a culture of education, which is reflected in our highly credentialed staff. We have 7 CFP® professionals, 4 CFA Charterholders, 2 MBAs, and 1 Enrolled Agent.

Associate Advisors are a critical component of the client advisory team. Each client has a 3-person advisory team that consists of a Lead Advisor, an Associate Advisor and a Client Service Associate. The Associate Advisor serves as the primary point of contact for clients and works with the Lead Advisor and Client Service Associate to make sure that all parts of the clients' financial life are addressed.

ASSOCIATE ADVISOR

- Acts as main point of contact for existing clients; coordinates with other client team members to ensure action items are completed.
- Maintains notes on clients and updates Salesforce and Client At A Glance. Updates MoneyGuidePro financial plan information and ensures accuracy. Works within a variety of planning tools and software to make sure that the information correctly reflects the client.
- Creates client meeting agenda and determines other deliverables to be presented, analyzes client data and develops strategies; collaborates with Lead Advisor to define both the client strategy and the most effective form of presentation.
- ·Reviews client allocation for adherence to Risk Tolerance and Strategic Asset Allocation. Coordinates with Lead Advisor, Portfolio Implementation Specialist and client to implement trades and allocation changes.
- Provides analysis for advanced financial topics such as stock options, deferred compensation, restricted stock units and tax loss harvesting. Reviews client's financial life for opportunities to reduce taxes.
- Coordinates with outside tax professionals and estate planning Attorneys. Directs change in client accounts as necessary from outside resources.

- Presents ideas and concepts in an organized and effective manner; attends client meetings and is expected to effectively present specific planning topics; ensures all client related action items are communicated and memorialized in the CRM.
- Works with the Client Service Associate to achieve timely execution of requests within time frames such as trades, wire requests and journals; initiates these requests and is responsible for reviewing and approving them; ensures completion within specified time frames.

CANDIDATE EXPERIENCE

- Three+ years of experience in financial planning preferred within wealth management or a related industry; expected to be current with industry trends, terminology and concepts
- Progress towards or completion of the Certified Financial Planner (CFP®) designation
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint) and expected to learn other position-related systems on the job
- Good time management ability in order to handle multiple client relationship requests and contending priorities from other team members. Uses team member resources effectively.
- Knowledge of the following programs is a plus: TD Ameritrade Veo, Schwab, Fidelity, Salesforce, Orion, MoneyGuidePro

COMPENSATION

Avier provides competitive compensation across a variety of different areas. Employees receive in compensation and benefits:

- Salary range: $65,000 to $95,000 (DOE)
- 401k match
- Insurance coverage with employer HSA contributions
- Flexible working schedules
- Paid time off
- Education reimbursement

Candidate compensation will vary by experience and is competitive with industry averages.

Please submit resume and cover letter to:
Info@avieradvisors.com

AVIER WEALTH ADVISORS
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