

## Associate Advisor

Austin, TX

**Brighton Jones, one of the country's fastest growing wealth management firms, is looking for a Lead Advisor to join the team and provide immediate positive service impact for our clients.**

Brighton Jones is a team that helps our clients, colleagues, and the global community live richer lives. That's our mission, and why we do everything we do. We are a team that collaborates together to achieve our goals, as we support our clients in reaching theirs. Successful candidates for this role and all roles at Brighton Jones will bring a "how can I help?" attitude and a willingness to do whatever it takes to help our clients and colleagues succeed. We are looking for someone who wants to contribute to and celebrate the success of others and be part of an organization that is a leader in the industry.

Brighton Jones is one of the nation's fastest growing RIA's. Over the past 20 years our team-based approach, relentless focus in evolving our service model, and operational foundation has enabled us to grow 100% organically from a 2 person start up to a 180-person enterprise, helping over 2,000 families and advising on over \$15B in assets. We are focused on growing our presence in Austin and building a strong team and community connection. Creating and maintaining an incredible culture is our secret sauce and our goal is to make sure each of our teammates loves working here, what they do, who they do it with, and who they do it for.

We are looking for our next Associate Advisor to make an immediate impact on our team and clients in Austin. In this role, Managers are responsible for managing the day-to-day responsibilities, priorities and workload of their client service teams. This includes providing analytical, operational, and administrative support for the acquisition, implementation and ongoing retention of clients.

### YOUR ROLE

- Acts as the first point of contact on client communications; strategizes with Lead Advisor to ensure responses are timely and thorough
- Reviews current client portfolios and makes recommendations to clients in consultation with team; proactively considers both strategic and tactical opportunities around investments and other planning areas
- Prepares comprehensive client meeting deliverables including Cash Needs Analysis, Strategic Asset Allocation, and Vocational Freedom Analysis; analyzes all client data and evaluates potential planning strategies
- Review, interpret, and strategize with Lead Advisors around clients' estate plans, insurances, charitable goals, tax situation, and equity compensation or career planning
- Provides spreadsheet analysis on an ad-hoc basis for more advanced financial topics such as tax loss harvesting, stock options and restricted stock, wealth transfer strategies, and risk transfer/management; maintains all record-keeping related to these activities, including cost basis and other position data via portfolio management software
- Responsible for reviewing, approving, and strategizing around trades and portfolio rebalances
- Attend and participate in client meetings; own the execution of post-meeting actions in conjunction with Analysts
- Seeks out leadership roles in team and firm projects/assignments

- Trains, guides, and mentors the team on more complex planning areas and strategic intricacies of service delivery and support (i.e. reviews financial plans and ad hoc reports/forms prepared by Analysts and gives feedback)

## YOUR EXPERIENCE

- 3 + years of experience in financial planning, wealth management or a related industry preferred
- Undergraduate degree required
- CFP required (or completed within 12 months of hire)
- Series 65 credential or equivalent required (or completed within 3 months of hire)
- Baseline proficiency in Microsoft Office Suite products (Word, Excel, Windows) required; expected to learn other position-related systems on the job
- Organized and able to handle multiple client relationships with contending priorities and coordinate team member resources most effectively
- This role is considered full-time and exempt

## OUR CULTURE

At Brighton Jones, we like to win. For us winning means continuous improvement - as individuals, as teams, and as a company. Everyone at Brighton Jones commits to developing the skills of curiosity, open-mindedness, vulnerability, empathy, and compassion in order to respond more thoughtfully to life and to create a culture of continuous improvement. Our Mindfulness-based Emotional and Social Intelligence (MESI) gives us a foundation of practices and a shared language to develop these skills. When we master these skills we not only win, we Live a Richer Life.

Our Team Personality is:

- **Genuine:** Our unquestioned commitment to integrity is reflected in all our personal and professional activities.
- **Focused:** We work together to manage heavy workloads and time-sensitive projects. We thrive in a fast-paced environment that fosters continued growth and development.
- **Approachable:** We enjoy interacting with each other and our clients, always projecting a professional, friendly, and capable image in everything we do.
- **Invested:** Our commitment to our clients and each other means that we are willing to maintain a flexible schedule to address cyclical work periods.
- **Driven:** We possess sound judgment, initiative, and decision-making skills. We anticipate problems, determine the appropriate level of response, and act accordingly.

**Our Team Pillars are:**

- Compassion
- Commitment
- Community
- Collaboration
- Continuous Growth
- Curiosity

Brighton Jones provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, Brighton Jones complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has offices. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

Brighton Jones expressly prohibits any form of workplace harassment based on race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, genetic information, disability, or veteran status. Improper interference with the ability of Brighton Jones's employees to perform their job duties may result in discipline up to and including discharge.

## HOW TO APPLY

Website: <https://jobs.lever.co/brightonjones?location=Austin%2C%20TX>

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Contact Information:

Nicole Bowers  
Brighton Jones Wealth Management  
[Nicole.bowers@brightonjones.com](mailto:Nicole.bowers@brightonjones.com)