Associate Wealth Advisor

Organization:	Buckingham Strategic Wealth
Date Posted:	10/19/2021
Date Needed:	10/19/2021
City:	Fairfax
Location:	Virginia
Country:	United States
Primary Category:	Financial Planning
Type of Position:	Full-Time
Education Requirement:	Bachelor's
Experience Requirement:	3-5 years

Description & Details

How to Apply / Contact

Associate Wealth Advisor

Overview

The **Associate Wealth Advisor** is a unique opportunity to collaborate with a growing team of advisors with key professional expertise to accomplish client goals. This individual will partner with a Wealth Advisor to manage client relationships and actively participate in the advanced planning process to address retirement, risk management, estate, and tax considerations. In addition, this individual will be responsible for managing cash, trading, rebalancing and investment strategy implementation on behalf of the advisory team's clients.

Essential Duties and Responsibilities

- Develops a mastery of Buckingham investment philosophy and evidence-based investing
- Creates a personalized Investment Policy Statement and holistic strategy for each client
- Facilitates the consulting process through the preparation and follow-up of each step of the client experience and active participation in client meetings
- Work with Portfolio Management to approve & execute portfolios, trade recommendations, tax loss harvesting, etc.
- Determine asset allocation based on clients needs, willingness & ability to take risk
- Diligent recording of client communication within Salesforce
- Create and draft financial plan on behalf of client using monte carlo analysis simulation
- Serves day-to-day client needs and collaborates with team members to ensure the highest level of service
- Assist with client billing reviews and collaborate with the billing department to ensure fees are collected in a timely manner
- Prepare daily report of deposits and withdrawals for the advisory team

Required Qualifications

- 3+ years of direct client-facing advisor experience
- Core knowledge of financial industry, financial products and financial planning concepts
- Bachelor's Degree
- Clean U4
- Professional Certifications; CFP, CFA or CPA/ PFS preferred

- Series 65 within 90 days of employment

Buckingham's Compensation and Benefits

This is a salaried position with an opportunity for an annual bonus and long-term incentives as well as a competitive benefits package and potential to purchase firm equity. Buckingham pays up to 100% of an associate's medical and dental insurance premiums, life, long-term disability and accidental death insurance policies. We offer 12 weeks paid maternity, paternity and medical leave, empowered Paid Time Off to take as many PTO days as needed, profit sharing retirement plan, 401(k) plan, deductible reimbursement, tuition reimbursement, matching gifts and more.

Who is Buckingham Wealth Partners?

Founded in 1994, Buckingham Wealth Partners is comprised of Buckingham Strategic Wealth and Buckingham Strategic Partners. For investors, we offer Buckingham Strategic Wealth, a Registered Investment Advisor (RIA) firm with a nationwide presence that delivers wealth solutions through comprehensive, values-based financial planning and an investment approach built on evidence and facts. For advisors, we offer Buckingham Strategic Partners, a comprehensive wealth management platform that delivers practice support and management services engineered to free up an advisor's workday so they can spend more time helping clients achieve their dreams of financial prosperity.

Buckingham employs more than 500 associates in over 40 office locations nationwide.

Buckingham Wealth Partners is an Equal Opportunity Employer. We believe that diversity, equity and inclusion among our associates is critical to our core 'Passion To Do Right' and our collective success. All employment related decisions are based on ability, performance, and organizational needs without regard to age, citizenship, color, physical or mental disability, marital status, national origin, race, religion, sex, sexual orientation, gender identity, military or veteran's status, genetic information or any class protected by applicable law or ordinance.

Buckingham's Awards & Accolades

- Top Workplace in St. Louis, St. Louis Post Dispatch, 2020, 2019, 2018, 2017, 2016 (first year we applied)
- Top 20 RIA, Financial Advisor Magazine, 2020, 2019
- Top 50 Fastest-Growing Firms, Financial Advisor Magazine, 2020, 2019
- Top Registered Investment Advisers, Financial Times, 2020, 2019
- Top 40 RIA Firms, Barron's, 2018
- Top 25 RIA, Financial Advisor Magazine, 2018
- Top 30 RIA Firms, Barron's, 2017
- Top 25 RIA Firm, Financial Advisor Magazine, 2017
- Top 100 Wealth Managers, Forbes, 2015

Send Resume and Cover Letter to - schesson@buckinghamgroup.com