

Shotwell Rutter Baer Associate Advisor Position

Our firm is seeking an Associate Advisor to join our firm as part of our Residency Program, starting in the spring of 2022. See Residency Program Overview for a detailed description of our vision for this role on our team. Shotwell Rutter Baer is an independent, fee - only registered investment advisory firm based in Lansing Michigan. Our firm is SEC registered and our team of five serves 180 families and manages \$125,000,000 in assets. We are a financial planning - focused firm and work with clients in either an asset - management or retainer/subscription relationship.

Candidates should be preparing to graduate from a financial planning program that qualifies for the CFP academic curriculum. The goal of the residency program is to provide the job experience necessary to complete the experience requirement to complete certification.

- Qualifications:
 - CFP® candidate or working toward qualifying as a candidate for CFP® exam
 - Demonstrated proficiency with written and oral client communication
 - Demonstrated proficiency with general office applications including:
 - Proficient in Microsoft Word and Microsoft Excel
- Compensation:
 - Salary \$50,000
 - Annual bonus based on goals and firm profitability
 - Benefits:
 - 401k Plan after 6 months with 3% matching contribution and profit sharing
 - Access to employee – paid group life and disability plans
- Job Description:
 - Support all aspects of client financial planning including:
 - Meeting preparation, participation, and follow - up
 - Research and analysis
 - Check in calls / plan updates
 - Plan and Portfolio reviews
 - Research and analysis
 - Client communication
- To Apply:
 - Forward cover letter and resume to address below or email info@srbadvisors.com
 - Qualified applicants will then be asked to provide:
 - Writing sample
 - Two letters of recommendation
 - Recorded Video Response to the following questions:
 - Why are you applying for this position?
 - What does a financial planning firm do?
 - Why do you feel you would be a good member of our team?

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