Investment Analyst & Client Relationship Associate

Grow your career with Stephen's Wealth Management Group (SWMG), a well-respected and nationally recognized comprehensive wealth management firm with a strong history dating back to 1975. It is our mission to help clients live a smart financial life, giving them freedom and peace of mind. We do that, in part, by living our firm core values: Integrity, Collaboration, Excellence, Innovation, and Community Conscious. SWMG is an independent RIA with more than 500 client relationships and an ensemble team of fourteen employees made up of Wealth Advisors, Financial Planning and Investment Professionals, Client Relationship Associates (CRA's), and Operational professionals.

This hybrid role will serve as the perfect foundation for anyone interested in growing a career in the wealth and investment management profession. You will be exposed to several aspects of the business immediately. In addition, we will support the right candidate in obtaining their CFP – with a completion date within three years of hire.

If you enjoy working in a team environment, have the desire to learn and grow through hands-on experience, and have a service mindset, then this might be the right opportunity for you. Note that superior attention to detail and collaborating with team members and clients daily will be an important part of your role. The position requires a proactive person with a positive demeanor, the ability to multi-task while maintaining accuracy, and a strong command of time management. Trustworthiness and honesty are crucial as the position requires the ability to work with highly confidential information.

In this position you will have the opportunity to work directly with the Chief Investment Officer, the Portfolio Implementation Lead, Wealth Advisors, the Director of Financial Planning, and other CRAs. You will be part of a forward-thinking firm, engaging in continuous development in alignment with the industry and our desire to serve clients and provide trusted advice.

What You Will Be Doing

Investment Analyst: You will provide support to the Investment Team working within our trading and billing tool - Envestnet Tamarac – so that you can learn to trade and provide billing support. You will work with Morningstar and Fi360 software to enter data, produce reports, and/or complete research for our 401(k) clients, prepare for and participate in Investment Committee meetings, including investment due diligence, create client proposals, and complete special projects in support of our Chief Investment Officer, Portfolio Implementation Lead, and 401(k) Project Manager.

Client Relationship Associate: You will serve as the front-line representative of the firm with a group of clients, working across the entire client lifecycle from prospect to mature client. You will build strong working knowledge of each client and their needs; assist clients with issues and concerns; prepare client correspondence and develop presentations, reports, meetings agendas, letters, forms, etc.; maintain records associated with client meetings and phone calls; and actively manage and track the completion of all action items in our Client Relationship Management (CRM) system. You will primarily support one to two Advisors and will be responsible for understanding their individual work style, strengths, and areas where they may need extra support. You may also support the planning associated with clients over time, especially as you move through the CFP curriculum.

What is Required for this Position

- Consistently applied business ethics and alignment with our firm's core values
- Delivery of superior client service, with a keen desire to not only meet client expectations, but to go above and beyond to ensure extreme client satisfaction
- Exceptional attention to detail and accuracy of information
- Exceptional analytical abilities, including the ability to see the big picture (forest through the trees)
- Quick learning, self-starter with the ability to ask questions proactively
- High level of proficiency with the entire MS Office suite, and the ability to learn new technologies
- Strong communications skills, including written, verbal, and interpersonal
- Able to operate in an environment requiring high levels of organization, flexibility, resourcefulness, and the ability to multi-task
- A positive, can-do attitude with clients and teammates, and capable of working both independently and as part of a team
- Able to discern appropriate actions when information is not entirely complete
- Bachelor's degree from an accredited college or university

What We Have to Offer

- Great company culture
- Merit-based performance bonus tied to goal achievement and personal development
- Healthcare coverage
- Employer-matching 401(k)
- Paid vacation and personal time
- Disability insurance
- Focus on employee development and advancement

Contact: Send an email to info@stephenswmg.com if interested in applying for the position.