Associate Advisor

About Spark Financial Advisors

Spark Financial Advisors is a fee only, fiduciary financial planning and investment management firm serving clients locally in Richmond and Williamsburg, VA, and virtual clients nationwide. We specialize in high-income women, dual-career couples, and business owners. Our clients are extremely busy and value a responsive, caring, and tech-friendly service.

We are proud to serve clients from a variety of backgrounds, and you must be comfortable working with a diverse clientele in order to be successful here. We are LGBTQIA+ affirming.

Our Core Values

Act with Integrity
Listen Deeply

Treat People with Respect
Have a 'Can Do' Attitude

About the Associate Advisor Role

We are a financial planning-first firm, so your role is mission critical to the success of our team.

The Associate Advisor will be responsible for client research, financial document review & analysis, financial plan creation and delivery, client meeting preparation, attendance & follow-up, ongoing support for client requests and questions, and portfolio rebalancing. As you become established with our clients you will start to take the lead on some client relationships.

This is a position with career "steps," as you take on more clients your compensation will increase as you work towards becoming a lead financial advisor.

About You

You have at least 3 years of financial planning experience. You know the financial planning process like the back of your hand and can manage it with limited supervision. You like people, even when they're frustrating. You have high emotional intelligence. You have a four-year degree from an accredited institution. You're curious and like to learn. You're organized and know how to see a project through to an on-time completion. You know your way around an Excel spreadsheet.

You have **already passed** the CFP® Exam.

You have a strong understanding of retirement plans, investing principles, taxation, 529 plans, insurance, and a working knowledge of estate planning.
You can communicate complex topics in an approachable manner.
You take compliance seriously.
Unique functional expertise around 401(k) plan administration, stock options, or student loans a major plus but not required.

Your skills:

Detail Oriented
Strong research and writing abilities
Listening
Impeccable manners
Process oriented
Follow-up
Client relationship experience
CFP® Professional or Candidate

Bonus skills (appreciated but can be learned on the job):

Right Capital, Fi360, Hubspot, Advyzon, Holistiplan, Schwab, Fidelity or Altruist Custodial platforms.

Familiarity with Kinder Life Planning or pursuit of other specialized financial planning skills a major plus.

* Our clients are high achievers and experts in their field, we expect the same from our team members. To progress from this role to a Lead Advisor role you must obtain and maintain the CFP® designation.

Position Details:

This is a full-time position in Richmond, VA. Our goal is for this role to evolve into a Lead or Service Advisor role depending on your skill set and preference.

Pay range is $70,000 - 90,000 base to start. Further income growth into 6 figures will occur as Associate Advisor takes responsibility for more clients. Increases occur with every 10 clients taken on after the first 20 clients.

10-15% bonus target

Career track to Lead Planner

401(k) match 4%

Group long-term and short-term Disability insurance

Support for conference attendance

Support for additional professional development

3 weeks of paid vacation plus all US Stock Market Holidays

Please email your resume to work@sparkfinancialadvisors.com