ASSOCIATE WEALTH ADVISOR

WHO WE ARE:

Pathfinder Wealth Advisors LLC, a growing wealth management firm, is seeking an Associate Wealth Advisor to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

We created Pathfinder Wealth Advisors to meet the unique planning needs of individuals and families. We do the most important thing an advisor can do; we guide clients on the path to a successful life. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

WHO WE WANT:

The Associate Wealth Advisor is an integral part of the organization. They will provide financial planning and relationship management to the firm's small to mid-size clients. Approximate account size $500K to $900K. This will allow the Senior Wealth Advisor to focus on the more complex client situations. Candidate must be a high-energy person with a positive can-do attitude.

Associate Wealth Advisor also plays a critical role in the back-office functioning of our firm. With responsibility for the firm's daily operational duties, the Associate Wealth Advisor helps keep the office running smoothly and ensures that all client paperwork and processing is handled in a timely, accurate, and professional manner.

WHAT TO EXPECT:

- Provide positive and professional service to the client base.
- Processes new accounts and account transfers.
- Handle all communication with the client base including phone calls, emails, and meetings.
- Attend all client meetings and be responsible for all follow-up activities.
- Build and maintain a relationship with the client base with the main focus on service and operations.
- Assist in developing annual client review materials.
- Assist the Senior Wealth Advisor as requested.
- Interact with the firm's operations team on all planning and follow up.
- Develop and maintain written systems of all activities.
- Required to deepen client relationships to obtain other accounts maintained by clients outside of Pathfinder. And encouraged to do some new business development.
- Attend all training and information sharing meetings scheduled for the operations team.

- Maintain all continuing education requirements of a wealth advisor plus required training elements.
- Attend all firm client events.

WHAT YOU NEED:

- Excellent interpersonal skills
- Excellent communication skills
- Excellent attitude and an extraordinary client service orientation
- A genuine interest in serving and caring for other people
- Excellent organizational and time management skills
- Ability to handle multiple tasks and a fast-past environment
- Series *65 is needed for your Registered Investment Advisor, or 66 and 7 preferred but not required.*
- Clean U-4 and U-5 history
- Bachelor's degree or higher strongly preferred
- CFP preferred but not required
- 3 to 5 or more years of investment advisory experience

In exchange for your expertise, we offer a base salary, bonus potential, 401(k) plus matching, (HRA) health reimbursement account, a potential for career growth, and a great working environment. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational and focused on healthy living. We work a hybrid model, with 3 days in office and 2 days from home. Yet this schedule is flexible.

If are interested in this opportunity, please send your resume and letter of interest to Josephine LaSpina Trotta at josephine@pathfinder-wealth.com or call her at 216-533-0463. For more information about our company, please visit our website www.pathfinder-wealth.com.

We are an equal opportunity employer, and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status, or any other characteristic protected by law.