



Challenge your thinking and build an amazing career with the best people in the financial services industry! Baird's Financial Advisors provide advice, strategies, and solutions to high-net worth individuals and families across the United States, serving as true partners. True wealth management goes beyond managing investments. At Baird, we understand it begins with learning all we can about what our clients want for themselves and their families. We work closely with them to prioritize their goals, utilizing Baird's resources and expertise to create a tailored plan to ensure success as they've defined it. Our 1,700+ private wealth associates serve clients coast-to-coast from 90+ locations in 30 states. We have been recognized on Barron's Top Wealth Management Firms for 10 consecutive years and hold over \$200 billion in client assets. Check out this [video](#) to learn more about our Private Wealth Management business.

As an Associate Financial Advisor you will:

Provide specialized services to an individual Financial Advisor to assist in their ability to offer sophisticated financial solutions to individuals and families and strategically build the client base.

- Operate within the team's client service strategy to ensure high quality client service.
- Review, research and analyze data to create customized financial planning reports for high net worth clients.
- Deliver the financial plan in partnership with the team.
- Document, follow up, and support the closing of opportunities identified from the financial planning process.
- Serve as a team specialist for queries on financial planning topics and consult with advisors on specific client scenarios.
- Monitor and track client revenues related to financial planning work to ensure sales opportunities are maximized.
- Engage the client/prospect, frame the discussion, and help convey the team mission to better position the Advisors for additional business opportunities.
- May provide direction to Client Specialists on the team regarding routine tasks and daily responsibilities.
- Performs other duties and special projects as necessary.

What you will love:

- This is an excellent opportunity to work for a high-performing Financial Advisor
- Strong potential for growth
- Opportunity to obtain future designation (CFP)
- Unique culture that values diverse backgrounds and perspectives while emphasizing teamwork and a strong sense of partnership
- Baird offers highly competitive benefits including tuition and continuing education reimbursements, and has a strong focus on professional development.

What we look for:

- Must have an undergraduate degree in Finance, Accounting, Economics or equivalent.
- Must have or be capable of and committed to pursuing and achieving the CFP (Certified Financial Planner) designation within 12 months of assuming the role.
- SIE, Series 7, and Series 66 required or ability to obtain within a specified amount of time.

- Minimum of three years of investment experience in a client facing role.
- Excellent presentation skills, very strong interpersonal and written communication skills.
- Proven self-starter, highly motivated, with the ability to work independently.

Who we are:

Baird is an employee owned, international wealth management, capital markets, private equity and asset management firm with more than 100 offices in the United States, Europe and Asia. Established in 1919, Baird has over \$200 billion in client assets and more than 3,400 associates serving the needs of individual, corporate, institutional and municipal clients.

At Baird, we believe every associate matters. We're committed to providing an environment of trust, respect and teamwork, where you partner with the best in the industry and thrive. As stated in our Associate Promise, we are passionate about how we achieve great outcomes together for our clients, communities and each other. Committed to being a great place to work, [Baird ranked No. 12 on the Fortune magazine 100 Best Companies to Work For in 2018](#), our fifteenth consecutive year on the list. Baird has also received a perfect score on the Human Rights Campaign Foundation's 2018 Corporate Equality Index. To learn more about Baird's culture, [click here](#).

How to apply: Please send resumes to aprice@rwbaird.com