



**ALPHA**  
FINANCIAL ADVISORS

## **JOB OPENING: Associate Financial Advisor**

Expected Start Date: MAY 2019 –JULY 2019

Alpha Financial Advisors, a fee- only registered investment advisory firm based in Charlotte, NC is seeking a qualified candidate for an Associate Financial Advisor position. The Associate Financial Advisor provides technical financial planning and investment management support to Lead Advisors. This position is well suited for an individual who craves hands on experience in assisting with daily functions in a fast-paced, dynamic environment. Associate Financial Advisors are key players in our collaborative, service-oriented culture. We provide regular feedback loops and direct mentoring/coaching for advancement within the firm. The position is designed to provide the right candidate a direct career path towards becoming a Lead Advisor. Our goal is to provide leadership development opportunities and hands on experience for maximum growth potential. The Associate Financial Advisor is primarily responsible for supporting lead advisors by shepherding the onboarding and financial planning processes, analyzing client financial data, modeling financial plan scenarios, and handling ad-hoc administrative client inquiries/tasks. The position offers the opportunity to attend client meetings in a technical, supporting and learning role.

### **Qualities that enhance success in this role:**

- Thrives in an energetic, collaborative team environment, but can also work independently
- Possesses a passion to serve others and maintains a positive attitude
- Has strong analytical skills; able to see the big picture and apply critical thinking
- Committed to excellence - client service goes above and beyond expectations
- Reliable, follows through on commitments and earns trust among peers and clients
- Strong communication skills (both written and verbal)
- Excellent organizational and time management skills, able to prioritize & meet deadlines
- Proficient computer skills and ability to learn in-house software programs and tools
- Keen interest in developing a career in a fast growing fee-only financial advisory firm
- Comfortable presenting and confident holding regular phone conversations
- Committed to personal growth and professional development
- Possesses humility - open and receptive to feedback and coaching

If interested, please send resume and cover letter to [lifepanning@alphafa.com](mailto:lifepanning@alphafa.com). No phone calls please. In your cover letter please tell us:

- **What attracts you to Alpha Financial Advisors?**
- **What would you bring to Alpha Financial Advisors?**
- **What do you need most from Alpha Financial Advisors?**
- **What would attract you to Charlotte other than working at Alpha?**

*Alpha Financial Advisors offers competitive compensation packages with bonus opportunities and full benefits. We are an equal opportunity employer. Selected candidate will be required to pass a drug test, background check and may be asked to complete personality and/or competency tests.*