CERITY PARTNERS®

Position Description: Associate Financial Advisor

Location: Midland, TX

Job Summary

The Associate Financial Advisor is a junior advisor/support position that provides technical support for all Financial Advisors. Responsibilities include data gathering, modeling, case design, scenario building, plan development, presentation development, etc. The Associate may participate in client meetings but not in an advice capacity. In addition, this position has no decision-making authority on client matters. Associates may also participate in developing investment and financial planning strategy decisions as part of the team's internal initiatives.

Duties and Responsibilities

Associate Financial Advisors can expect to focus their work in the following areas:

- Client relationship management, including ongoing and regular client contact and communications;
- Client service, including planning updates, portfolio changes and reviews, information data gathering, implementation of recommendations, correspondence, and reporting;
- Client asset management, including coordination of complete financial planning and wealth management (analysis, estate planning, tax strategies for assets under management, and portfolio management);
- Client and team meetings, operations support, and special projects, as needed.

Qualifications

The Associate Financial Advisor position typically requires the following qualifications:

- Self-confidence, personal integrity and an understanding of fiduciary responsibility;
- A team player, with strong leadership skills and ability to multi-task and manage time effectively;
- Bachelor's Degree from an accredited college or university; Demonstrated desire or progress toward CFP certification;
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as financial planning, client relationship management (CRM) and portfolio management (PM) software;
- Excellent communication and listening skills;
- Desire/ability to work successfully in a small company environment;
- Detail-oriented focus and a professional demeanor;

Salary and Benefits

Pay/benefits are competitive based on industry standards.

Company Overview:

Cerity Partners is a leading, national registered investment advisory firm serving high-net-worth individuals and their families, businesses and their employees, and nonprofit organizations from its offices across the country. Our in-house experts of attorneys, tax advisors, financial planners and investment professionals are passionate about and committed to providing objective financial advice and oversight.

Our mission is to positively impact the financial well-being of our clients by delivering objective financial advice. Our culture allows us to deliver this mission. We believe in a simple formula that drives our actions and pushes us every day to do better than the day before: People First + Accountability = Winning Outcomes. We expect our team members to deliver on their responsibilities, understand how every component of our company works to generate success, and hold themselves and their colleagues accountable to the highest standards. As a result, we will enjoy talking to you if you:

- Understand the need to provide a world-class customer experience.
- Value the collaboration of insightful, experienced colleagues to deliver our services.
- Demonstrate a strong affinity in financial services, exceptional communication, organization, and prioritization skills.

We welcome others who share our mission and passion. Please submit resumes and cover letters through Hire Red Raiders for the upcoming Opportunity Days event.