



Client Advisor – Associate

About Us

Autumn Lane Advisors is a Houston-based family investment office that provides thoughtful, unbiased wealth management solutions in a family office culture. The firm currently provides consulting services to four families in addition to managing several private investment partnerships.

Purpose of the Role

Assist in providing a valuable client service experience to our high net worth family clients.

Responsibilities

- Manage the input of client financial data into Black Diamond (portfolio management software program); verify accuracy, troubleshoot errors, and ensure the highest quality of all reports.
- Organize client financial data into comprehensive proposals and reports.
- Monitor investment compliance with Investment Policy Statements.
- Prepare all forms required for client signature (account opening, subscription agreements, etc.).
- Assist advisors with the organization of client information, periodic reporting and preparation of financial plans.
- Support advisors in preparing for client meetings.
- Attend client meetings as needed and document action items and takeaways.

Qualifications

- Bachelor's degree (Masters preferred)
- Experience with Black Diamond preferred
- Experience with forms, processes and procedures at Schwab Institutional or similar custodian
- Familiarity with investments, including concepts of modern portfolio theory and diversification
- Basic understanding of comprehensive personal financial planning, including retirement planning, employee benefits, insurance, investment vehicles, asset allocation, estate planning, income tax and executive compensation
- Strong proficiency with Microsoft Excel and Word
- Professional communication skills, both written and verbal
- Detail-oriented, accurate, organized and able to set priorities in managing projects
- Ability to thrive in a collaborative, small-office environment
- CFP®, or demonstrated progress toward the CFP® preferred

Interested applicants should send their resumes with a cover letter to info@autumnlanelc.com.

Autumn Lane Advisors is an equal opportunity employer and considers all qualified applicants for employment without regard to race, color, religion, sex, national origin, or other legally protected characteristic. No phone calls or direct mail, please. No third parties.