

Associate Advisor

Brownlee Wealth Management is seeking an associate advisor to support our clients and join our rapidly growing firm. The Associate Advisor will serve as a point of contact for clients and manage client relationships.

- **As an associate advisor, your primary responsibilities will be:**
 - Moving new clients through the onboarding process
 - Running financial planning analysis and preparing financial planning deliverables
 - Promptly responding to client requests and questions
 - Assisting in meeting preparation, including preparing deliverables
 - Working with team and tech platforms to ensure ad-hoc questions are promptly answered
 - Researching one-off financial planning questions
- **Additional tasks may include:**
 - Developing business by meeting with prospective clients
 - Maintaining the CRM to ensure meeting notes are archived and that tasks are assigned and completed correctly
 - Supporting the service team with preparing and processing client paperwork and preparing onboarding documents
 - Generating investment proposals and conducting investment research
 - Creating content
- **Preferred Qualifications and Skills:**
 - 2 - 5 years of experience working as a financial planner or investment advisor
 - Bachelor's Degree in financial planning, finance, business, or another related field
 - Active CFP® certification or progress towards obtaining it
 - Excellent communication skills and is comfortable communicating with clients primarily via email, as well as via zoom, phone, and in-person
 - Experience with industry-specific tools (ex. Orion Advisor Services, Eclipse, Wealthbox, Hubly, TD Ameritrade Veo One, Fidelity Wealthscape, Advicepay)

About Us: Brownlee Wealth Management is a fee-only financial planning firm with offices in The Woodlands, TX, and Bentonville, AR. We exist to provide exceptional advice with a specialty in executive compensation for Oil, Gas, and PetroChemical Professionals. We help families simplify their investments, lower their taxes, and grow their wealth. We're a young company founded in 2019 but growing rapidly due to our laser focus on our niche. We believe in being fiduciaries and operating in the best interest of our clients at all times.

- **About the Role**
 - Full-Time W2 Position in Houston, TX
 - **Compensation:** \$75,000 - \$100,000 annual salary depending on experience
 - **Benefits include:** retirement plan with match, unlimited vacation, company Macbook, company-paid professional development

Send resume and cover letter to info@brownleewealthmanagement.com (bonus points if your cover letter is a video!)