Tanglewood
TOTAL WEALTH MANAGEMENT

Associate Advisor

Tanglewood is one of the largest, independent, wealth management firms in Houston with approximately $1.4 Billion in AUM and 450 client relationships. For more than 40 years, the firm has worked with the "quietly wealthy" to help make the most of their wealth with our Signature Service. We approach each client with the same care, concern, and attention one would give a dear friend.

Position Summary
The Associate Advisor is an entry-level position for an aspiring professional that allows one to learn and participate first-hand in Tanglewood's key wealth planning disciplines: Financial Position Analysis, Risk Management, Tax Planning, Investments, Wealth Accumulation/Decumulation, Estate Planning, Charitable Giving and Family Legacy/Continuity. As a member of the Wealth Planning Team, the Associate Advisor provides technical and administrative support to the Senior Wealth Advisors.

Responsibilities
- Assist the Senior Wealth Advisors with managing client relationships
- Participate in new client data intake, organization, and analysis
- Assist in the development and presentation of wealth planning deliverables
- Schedule client meetings and develop meeting agendas
- Prepare follow-up communications and post-meeting notes
- Learn the process of opening, maintaining, and transferring client accounts
- Help develop and refine the Associate Advisor Position

Qualifications
To succeed at Tanglewood, an Associate Advisor must possess integrity, empathy, attention to accuracy, and excellent problem-solving and project management skills. Exceptional oral and written communication skills are paramount. You must also have the CFP® certification or work toward its achievement.

Proficiency with Microsoft Office software suite, particularly Excel is a plus. Familiarity with industry tech like e-Money, Holistiplan, BNA Tax Planner, Social Security Analyzer and Salesforce is also advantageous, but not required.

Compensation & Benefits
- Competitive salary
- Bonus opportunity
- 401(k) with employer match, and profit sharing
- Company-paid employee Health Insurance
- Employer HSA contribution
- Long-term disability
- Life insurance
- PTO and paid holidays

Why Tanglewood?
- A "clients first" culture
- A fiduciary duty of care for all client relationships
- Modern workspace and a leading tech stack
- A rewarding place to work and grow
- Individual annual charitable giving allowance
- Family-friendly work environment
- Refreshments and weekly team lunches provided
- Free onsite parking

Please email resume and cover letter to team@tanglewoodwealth.com . In the cover letter, state why you would be a good candidate for this position and your three most defining characteristics or attributes. The letter is the first step of the interview process, demonstrating your writing stills and ability to follow directions.