**Associate Wealth Advisor Job Description / Posting**

*Glen D. Smith and Associates / Raymond James,* a growing wealth management firm, is seeking an Associate Wealth Advisor to join us in our mission of helping clients achieve their financial goals. This is a young highly energetic and goals-oriented team. This is your chance to play a key role in the future success of our fast-growing organization!

*Become a member of one of the most respected teams in the wealth management industry. Glen Smith was recently named as one of Forbes Best-in-State Wealth Advisors for 2019, 2020 and 2021, a prestigious recognition for standout wealth advisors who top the list in each state.*

Our mission at *Glen D. Smith and Associates* is to *offer our clients peace of mind surrounding their financial goals with sophisticated financial planning and a high level of customer service.* The Associate Wealth Advisor plays a pivotal role in attracting and retaining clients. If you have a relentless, burning desire to succeed as a wealth advisor and share our vision, then we would love to hear from you!

**Description**

The Associate Wealth Advisor will establish new client relationships in addition to providing advisory services and support to a select group of clients. With financial planning responsibility for the firm’s small to mid-size clients, the Associate Wealth Advisor has the opportunity to help the team continue to expand presence in North Texas and beyond.

**Responsibilities & Activities**

* Follows up on firm-generated leads.
* Services and delivers financial planning to client base.
* Assists in developing client presentations.
* Services client needs and requirements as determined through client interaction. Proactively communicates with clients.
* Promotes the firm’s wealth enhancement and planning services.
* Promotes established investment models and strategies that are suitable for our targeted clients.
* Adheres to all company and industry supervisory guidelines and policies.
* Participates in required meetings, training, and continuing education requirements.
* Assists the Firm’s Principal Wealth Advisor as requested.
* Performs other duties as assigned.

**Industry Experience Requirements**

* At least three to five years of financial planning and/or investment advisory experience, especially working with high-net worth clients.
* Active Series 65 or 66
* Clean U-4 and U-5 history.
* Certified Financial Planner (CFP) preferred.

**Knowledge, Skills, & Abilities:**

* Requires:
  + Excellent verbal, written, presentation, and interpersonal communication skills.
  + Excellent relationship management skills.
  + Superior business development skills.
  + Excellent attitude and an extraordinary client service orientation.
  + A genuine interest in serving and caring for clients.
  + Excellent organizational and time management skills.
  + A burning desire to succeed.
  + Proficiency with Microsoft Office Suite.
  + Bachelor's degree or higher strongly preferred.
* Attendance is an essential function.
* Salary is commensurate with experience.

We also offer a great working environment in a beautiful and professional office location. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational, and focused on improving our client’s lives.

For more information about our company, please visit our website [www.glendsmithandassociates.com](file:///C:\Users\glend\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\6A6GLY44\www.glendsmithandassociates.com)