EQUISTAR WEALTH MANAGEMENT

Associate Wealth Management Advisor

www.eswealth.com

Company

Equistar Wealth Management is an independent, fee-only firm located in Austin, TX. We provide comprehensive financial planning and investment management to high-net-worth individuals and families. Our small team values close relationships with our clients to provide custom and proactive advice.

DESCRIPTION

- In collaboration with a Senior Advisor, lead client relationships in terms of day-to-day communication. Work with clients to develop, implement, and maintain a comprehensive financial plan and investment strategy.
- Lead the implementation of planning decisions, ensure operational and administrative tasks are completed, and execute investment recommendations.
- Proactive and consistent communication with clients, regular meetings to perform planning and investment reviews. Document meetings, calls, and tasks in the firm's CRM.
- Manage and maintain financial planning software, CRM, and investment management software.

QUALIFICATIONS

- Bachelor's degree
- 2-5 years experience of client-facing financial planning experience
- CFP or CFA designation highly preferred, consideration given if you are working towards one of the designations
- Proficiency in financial planning software, CRM, and investment management systems
- Excellent communication skills, and ability to convey financial and planning knowledge to clients
- Trustworthy, accountable, passion for customer service, strategic thinker, organized, ability to balance multiple responsibilities

COMPENSATION

Salary Plus Bonus

Contact

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