JLFranklin
WEALTH PLANNING

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Registered Investment Advisor

Associate Wealth Advisor

JLFranklin Wealth Planning is a small, growing fee-only firm, with headquarters in beautiful Marin County, CA, just 9 miles north of the Golden Gate Bridge, and a 30-minute ferry ride from downtown San Francisco. We have an outstanding full-time opportunity for an Associate Wealth Advisor. Although we are looking for someone with related experience to join our Marin office, finding the right person is our top priority, even if that person works remotely. We offer a stimulating, fast-paced environment with long-term growth potential.

Compensation is competitive, and benefits include medical insurance, 401(k) and profit sharing, paid time off, and a casual dress code. Weekly staff lunches maintain our collaborative environment, and we encourage professional development by providing financial reimbursement for classes and conferences.

The owner of the firm has more than 25 years of experience, a tax background, and a roster of tech and entrepreneurial clients. The Associate Wealth Advisor will work closely with her, enjoy a variety of on-the-job learning opportunities, and be able to specialize as the firm grows.

Summary of Responsibilities
The Associate Wealth Advisor supports Senior and Lead Advisors with all aspects of wealth management, including resolving client requests, data gathering and analysis, financial planning and portfolio reviews, meeting preparation, client communication, client account maintenance, drafting trades, researching investments, and implementation of recommendations. Additionally, the Associate Wealth Advisor will participate in business development activities to attract clients. All client relationships are handled on a team basis, and the Associate Wealth Advisor is a key member of the team.

We have developed a career path for this role to become a Lead Advisor.

Desired Skills
- Analytical skills to prepare and assess client financial statements, plans, and investments
- Strong communication skills with the ability to interact with our Wealth Advisors and high net-worth clients, verbally and in writing
- Working knowledge of Microsoft Office Suite (Word, Excel, and PowerPoint) using a Windows-based computer
- Interest in mastering financial planning, client relationship management (CRM), and portfolio management software
- The ability to manage time effectively and prioritize projects to ensure on-time completion
- A highly collegial and collaborative work style; able to work well with all members of the team and pitch in on all aspects of serving our clients
- Strong work ethic and eagerness to "roll up your sleeves" to get things accomplished
- A high level of professionalism

Desired Qualifications

- 2 to 5 years of experience in the financial services industry, or at least 5 financial planning classes
- Bachelor's degree in financial planning or a related field
- Acute attention to detail and accuracy
- Excellent written and verbal communication skills
- Uncompromising ethical standards
- Desire and ability to work successfully in a small company environment and collaborate with others
- A compassionate, approachable, friendly personality
- A client-comes-first attitude

Location

Larkspur, California

How to Apply

Please visit the Job Opportunities page of our website at www.JLFwealth.com to apply and submit a cover letter and a resume. We prefer PDF attachments. Unfortunately, we are unable to accept direct calls or emails about this position. Thank you in advance for your interest!