

**Robare & Jones Wealth Management**

[www.robare-jones.com](http://www.robare-jones.com)

20405 State Highway 249 Suite 350

Houston, TX 77070

Position Needed - Associate Advisor / contact Jack Jones at [jack@robare-jones.com](mailto:jack@robare-jones.com) with resume if interested.

Job responsibilities include but are not limited the following Financial Advisor roles:

* Comprehensive Financial Planning
* In person and web-conference client meeting preparation and follow-up
* Quarterly Investment Forums
* Investment, tax, and financial planning research
* Management of account aggregation software and other financial technologies
* Trading

Desired skills and experience:

* Positive attitude and willing to work as a team
* Outgoing personality and desire to work directly with clients
* Multi-task and time management
* Microsoft office applications
* Active listener and fast learner
* Experience with financial planning software, client relations management (CRM) software, and portfolio management software highly desired but not required. We currently use Black Diamond, Money Guide Pro, Riskalyze, Sales Force, Morningstar among others.

Salary and Benefits:

* Competitive Salary plus bonus
* No requirement to bring in new clients
* Retirement plan match
* Health insurance
* Private office
* Friendly work environment

Qualifications:

* Bachelor’s degree
* Currently pursuing or plan to pursue CFP
* Series 7 license – have or plan to pursue

About Robare & Jones Wealth Management:

* Clients first focus and commitment – we have deep and long-term relationships with the clients we are privileged to serve
* We are conveniently located in Northwest Houston in a class A office building
* We are an Independent Wealth Management firm
* Mature firm with new clients almost exclusively coming from referrals
* Relocated and went independent in 2003
* High level of client retention