



QuadCap Wealth Management, LLC

Positions Available: Financial Analyst / Financial Assistant

Location: Frisco, Texas

Company Overview

QuadCap Wealth Management, LLC is a boutique firm located in Frisco, TX with an outstanding work environment. We are a quick-growing, independent wealth management firm that offers financial planning with a truly personal and proactive approach. At QuadCap, we offer an array of comprehensive services including:

- Portfolio management
- Tax planning and preparation
- Estate planning
- Wealth transfer strategies
- Retirement planning
- Employee benefits planning

Responsibilities

The employee will begin as an assistant to the current advisors and learn the basic functions of the firm. The experience they gain, along with the work accomplished while assisting the advisors, will gradually train the employee into the role of a financial advisor. Additional responsibilities include:

- Assistance with client documents, applications, and meeting preparation
- Data input and software reporting
- Client relationship management
- Investment research and tax preparation

Qualifications

- Positive, opportunistic, possessing an eagerness to learn
- Strong organizational skills
- Effective written and verbal communication skills
- Experience with standard office and financial software programs
- A background in the field of Finance and/or Financial Planning is a plus!

Please e-mail your resume to njohnson@quadcapwm.com.