**Why We Stand Out:**

*Kaufman Rossin Wealth* is a Registered Investment Advisor that is a wholly-owned subsidiary of *Kaufman Rossin and Company*, Florida's largest privately-owned CPA and advisory firm that has been helping individuals and businesses in the South Florida community for almost 60 years. *Kaufman Rossin Wealth* is in a high-growth mode, with a business model to acquire the majority of our new clients via introductions from the associates of *Kaufman Rossin and Company*. *Kaufman Rossin Wealth* builds/acquires client relationships based upon a foundation of financial planning, and is led by highly experienced professionals. Many of our team members have 20+ years of industry experience and are highly credentialed. There is also a high level of collaboration with our affiliated company, *Kaufman Rossin Insurance Services*.

**How You’ll Contribute:**

Based out of our Coconut Grove (Miami) location, the **Wealth Management Representative** would work within an existing team to both support current client relationships as well as the onboarding of new ones. Potential for advancement to a Wealth Advisor role with more direct account responsibility and revenue performance goals and additional licensing requirements. Areas of performance may include support of:

* Portfolio management
* Financial planning
* Regulatory compliance
* Client acquisition activities

**What Skills You’ll Bring:**

* Undergraduate degree in Business/Finance/Economics related degree
* Additional training/coursework specifically in Financial Planning
* Prior internships/relevant employment experience
* Strong analytical and presentation skills
* Proficient with MS Office, Excel, Power Point, Word
* Series 65 license to be attained within 120 days of employment

**How You’ll Stand Out:**

* Bilingual in Spanish
* Previous experience in Wealth Management/Financial Planning

***We embrace authenticity.****Kaufman Rossin is an equal opportunity employer.  We are committed to creating a culture that reflects the diversity of our firm and clients. We encourage understanding, acceptance, and celebration among all people. That includes lifestyle, education, experience, race, ethnicity, age, religion,* *physical ability, sexual orientation, and gender identity.****Differences make unique varieties***