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**Welcome to Leo Wealth**

Leo Wealth is a fast-growing wealth management firm with offices in the US and Asia and we're expanding our team. We are seeking experienced, enthusiastic professionals who can support our continued growth.

We are 100% independent, owned and operated by a diverse group of equity partners who came together over shared values of providing trusted advice, international expertise, and personal commitment to do better for clients. We believe our independence is one of our strongest assets, and our people are what make us special. Every day we commit our energy, expertise, and initiative to the preservation of wealth, the growth of capital and the creation of value. We work together on a foundation of trust, transparency, and accountability.

With offices in Hong Kong, New York, New Jersey and Dallas/Ft. Worth, our wealth professionals provide comprehensive expertise and personal guidance to support both private clients and companies. We support global citizens through their journey to achieve wealth creation and protection across borders. Our bespoke offerings include holistic wealth management, global tax planning, cross border estate planning, alternative investments, and global portfolio strategies.

Many of our team members have advanced credentials and professional development is highly encouraged. We often promote from within and pride ourselves in being a great place to work and grow.

**Wealth Associate – Texas/NY/NJ**

This client facing and supporting role offers opportunities for accelerated learning and professional development and is suitable for individuals aspiring for a career in wealth operations or as an adviser or relationship manager.

**Core Job Responsibilities**

* Provide administrative support for senior advisers and their clients
* Assist in business development
* Conducting new account opening and client on-boarding
* Follow up on new account applications and client service requests
* Schedule and prepare for review meetings with clients
* Oversee data entry of new client information into CRM and other systems
* Prepare reports and financial statements for clients in Word and Excel
* Coordinate information requests for advisers and their clients and organize client data
* Attend client meetings with advisers and independently manage follow up
* Assist clients with updating their personal details and help maintain client files and records
* Other administrative support for clients and advisers as needed from time to time

**Core Skills and Qualifications**

* At least 1 year of experience in operations and administration or client relationship management-Internship and Co-Op apply
* Prefer bachelor’s degree or higher in a relevant field. Strong interpersonal, organizational and communication skills
* While industry experience is a plus, the role is open to strong candidates who do not have a background in financial services but have strong administrative and operational skills and are willing to learn
* Team player able to work with other client advisers and senior management in supporting some of the firms largest and most complex clients. Also, able to assist in training and developing junior advisers’ skills in client planning
* Extensive background in use of Windows and Microsoft based products, including Office applications (Word, Excel including pivot tables, and PowerPoint). Knowledge of and ability to learn and use CRM systems and software for client and company reporting
* Ability to work both independently and with a diverse, international team
* CFP/CFA/CPA/TEP or an interest in obtaining these or other relevant credentials is a plus
* Ability to adhere to the highest standards of confidentiality and integrity
* Ability to provide references and submit to a background check
* Ability to travel

**Benefits**

Employees across the firm have access to competitive benefits, including insurance, retirement plans and personal leave. Our benefit programs are tailored to local markets and roles. Across all offices we actively encourage professional development and support team members at all levels to improve their skills and professional qualifications. We actively promote from within and pride ourselves on providing a great work environment where all employees can flourish.

All our offices have employee wellness programs to help employees deal with issues like stress, illness, bereavement, mental health, performance, and other challenges. We provide active support for employees who are working flexibly, ensuring connectivity to management and their teams as well as support for their own health and wellness while working remotely.

We actively support flexible working arrangements, including flexibility around parental leave and family care leave for employees to take care of their family members.

**Diversity and Inclusion**

Our We are proud to provide employee with diverse and inclusive workplaces, where all employees are respected and valued and equal have access to opportunities. As a boutique firm, catering to our clients’ unique personal circumstances, we know diverse teams better understand and relate to our diverse clients’ needs. As a growing entrepreneurial business, diversity of thought, opinion and experience help us make better decisions and be more innovative, while an inclusive work environment which grants all employees equal access to opportunity attracts high-quality people and makes the firm a better place to work for everyone.​

Interested applicants can email Stephen Tally [Stephen.tally@leowealth.com](mailto:Stephen.tally@leowealth.com)