**Wealth Management Associate – Dallas, TX**

**Wisniewski Wealth Management**

We are seeking a Wealth Management Associate for our fee-only wealth management firm in Dallas, TX. We are very interested in candidates pursuing the CFP® certification and those who want to provide holistic wealth management services to high-net-worth clientele. Candidates that fit in to the firm and culture will desire to be in an independent RIA firm environment acting in a fiduciary capacity that embraces technology, believe in passive investing, and working in a collaborative environment.

This is a professional position that will primarily support the advisory team directly in managing existing and new client relationships. You will be expected to assist in various projects including portfolio reviews and preparing financial projections using E-money financial planning software. A working knowledge of portfolio allocation, investment management and general financial planning is expected. Knowledge of tax return preparation and planning would be a big plus. The team lead is available to provide mentoring and big picture direction, but you must have the ability to utilize critical thinking skills, work independently and anticipate firm needs and client questions. This is a challenging position that requires you to work closely to the owner in all areas of the client engagement. The position could lead to a full- time position if the candidate is only able to work part-time.

**Initial Key Areas of Responsibility:**

• Assist wealth advisors in preparing for client meetings and completing ad-hoc firm projects  
• Assist wealth advisors with prospective clients by gathering data, reviewing portfolios, creating financial plans, identifying advanced planning opportunities and creating wealth management plans.  
• Assist wealth advisors with tax preparation and tax planning.  
• Work with all software programs.  
• Support administrative team as needed.

**Potential Future Key Areas of Responsibility:**

• Assist with trading and re-balancing of client investment accounts  
• Deliver multidisciplinary financial planning advice for high net-worth clientele • Develop and manage on-going client relationships  
• Delegate appropriate tasks to supporting team members  
• Provide input on strategic plan and direction of the firm

**Required Qualifications:**

• Organized, with a strong attention to detail  
• Completed or on track to complete a B.A. or B.S. degree preferably in Financial Planning, Finance, Accounting or Economics  
• Strong financial and analytical skills  
• Strong persuasive and interpersonal skills  
• Ability to identify, meet and follow through with client needs and requirements  
• Must be a self-starter, problem solver and a goal-oriented team player with a ‘no job is beneath me’ attitude  
• Able to work independently and keep team lead aware of progress and hurdles  
• Show curiosity and confidence when dealing with clients and advisory team  
• Positive attitude and punctuality

If interested, please send your resume to **Scott Wisniewski**: [s.wisniewski@wi-wm.com](mailto:s.wisniewski@wi-wm.com)