NOVA
wealth management group

Associate Wealth Advisor

Job Posting

The **Associate Wealth Advisor** is a unique opportunity to collaborate with a growing team of advisors with key professional expertise to accomplish client goals. This individual will partner with Wealth Advisors to manage client relationships and actively participate in the advanced planning process to address retirement, risk management, estate, and tax considerations. In addition, this individual will coordinate with the Wealth Advisors to manage cash, trading, rebalancing, and investment strategy implementation on behalf of the advisory team's clients.

Essential Duties and Responsibilities

- Facilitates the client experience through the preparation and follow-up of required tasks including active participation in client meetings
- Monitors the clients' asset allocation, rebalancing of portfolios, trade recommendations and submissions
- Tax loss harvesting recommendations and execution
- Diligent recording of client communication in CRM databases
- Wealth analysis input (including client/scenario-based simulations)
- Serves day-to-day client needs and collaborates with team members to ensure the highest level of service
- Develops a mastery of Nova investment philosophy and evidence-based investing

<u>Additional Responsibilities</u>
- Manages client onboarding process
- Work closely with all team members to maintain client relationships
- Assist in preparation of investment analysis and retirement planning

Desired Skills and Experience

<u>Education and/or Work Experience</u>
- 3+ years of success as a Financial Planner or as an Accountant, Estate Planning Attorney or other comparable profession.
- Advanced degree and/or certifications; CFP®, CFA, CPA/ PFS strongly desired
- College Degree

<u>Other Qualifications</u>
- Proficient in Microsoft Word and Excel
- Team player and collaborative
- Well-developed interpersonal and communication skills – able to build trusted relationships
- High personal standards and sound judgement
- Ability to think critically and to process complex financial scenarios
- Strong attention to detail and accuracy
- Strong time management skills – ability to multi-task, manage deadlines and prioritize
- Open and receptive to feedback and coaching