



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 advisors to manage client relationships, provide operational support 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 advisors to manage cash, trading, rebalancing and investment strategy implementation on behalf of the advisory team's clients.

Essential Duties and Responsibilities

- Provide comprehensive operational support to clients, including money movements, transactions, and account maintenance requests
- Process, facilitate, and monitor the progress of account paperwork in order to establish and maintain client accounts
- Develops a mastery of Nova investment philosophy and evidence-based investing
- Facilitates the consulting process through the preparation and follow-up of each step of the client experience and 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

Additional Responsibilities

- Manages client onboarding process
- Work closely with all team members to maintain client relationships
- Assist in preparation of investment plans and retirement plans

Desired Skills and Experience

Education and/or Work Experience

- Previous client service experience and/or bachelor's degree in relevant field
- Strong attention to detail and ability to prioritize
- College degree and/or CFP® or CFP® Track strongly encouraged

Other Qualifications

- Proficient in Microsoft Word and Excel
- Team player and collaborative; uses the resources of the firm
- Well-developed interpersonal and communication skills – able to build trusted relationships
- High personal standards and sound judgement
- Strong attention to detail and accuracy
- Strong time management skills – ability to multi-task and manage deadlines
- Open and receptive to feedback and coaching