Associate Advisor

This is a great opportunity for a financial planner wanting to grow and develop their career at one of the fastest-growing independent wealth advisors in the Pacific Northwest.

The associate advisor is a key contributor to client relationships and will work closely with lead advisors to deliver wealth management services consistently across all clients. This will include providing analytical support, gaining an understanding of client goals and values, and integrating those goals and values into a cohesive wealth management strategy that includes investment strategy and philanthropic and financial planning. It also includes implementation and ongoing oversight of those strategies.

Responsibilities

Under the direction of the lead advisors and the Chief Wealth Strategist, the associate advisor will:

- Be responsible for coordinating the day-to-day delivery of wealth advisory services to clients
- Facilitate communication among team members (Client Service Associates, Portfolio Managers, and Lead Advisors)
- Create and maintain financial plans in eMoney
- Review reports, update financial plans, and identify issues in preparation for regular client meetings
- Assist with ongoing portfolio monitoring and account maintenance
- Provide information to and coordinate with clients' CPAs, attorneys, insurance agents, bankers, etc.
- Support nonprofit clients with cash flow analysis
- Stay up-to-date on various financial planning topics through conferences and other educational opportunities
- Develop relationships with attorneys, bankers, and CPAs to build future business referral sources.
- Support new client acquisitions by participating in the sales process
- Proactively network and represent the firm at various functions

Qualifications

- Bachelor's degree from an accredited college or university in a finance-related field
- Have or be working towards the CERTIFIED FINANCIAL PLANNER™ designation
- Excellent written and verbal communication skills
- Highly proactive with a strong work ethic
- Strong analytical skills
- Exceptionally organized and detail-oriented
- Passionate about client service and diligent about confidentiality

- Confident interacting with clients and colleagues
- A team player
- Self-motivated
- Driven towards continuous improvement
- Familiarity with eMoney Advisor strongly preferred
- Ability to employ advanced data functions within MS Excel

Compensation and benefits

- Pay and benefits are competitive with industry standards
  - Base salary determined by experience and education
  - Full benefits including healthcare, bus pass, and profit sharing
- Support of your pursuit of industry designations and additional career development opportunities

Company Description

Fulcrum Capital attracts and retains the most talented, credentialed, and community-minded professionals in wealth management. Every member of our seasoned team is passionate about helping clients achieve their financial goals.

Founded in 2007, Fulcrum Capital, LLC is an independent Registered Investment Advisor headquartered in Seattle. Clients choose Fulcrum for the depth of our planning expertise and our active approach to investment management that allows us to align their investments with their values. Our clients and team members value our independence, transparency, and thought leadership, particularly in the realm of sustainable investing. We value diversity and support work-life balance. Our firm is majority women-owned and all of Fulcrum's owners work at the firm; we are 100% independent.

Qualified candidates please contact:

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