

**Title**

Associate Wealth Advisor

Location

Larkspur, CA/Remote

Job Description

We are seeking an exceptional Associate Wealth Advisor (AWA) to join our team. We need an outstanding individual with a talent for problem-solving, meticulous attention to detail and a positive, can-do attitude. This team member will work directly with Senior Wealth Advisors (SWAs) and a talented team of wealth management professionals dedicated to servicing sophisticated, high net worth individuals and families and providing a best-in-class service experience.

About the Team

We are a dynamic, growing independent wealth management team based in the Bay Area, offering comprehensive wealth management services to individuals and families. Specializing in guiding successful individuals and families through their peak career and parenting years, we address the myriad of decisions facing this demographic.

Responsibilities

- Provide direct support to SWAs in daily aspects of client service, portfolio management and financial planning.
- Input and manage all custodian requests and money movement for client relationships; serve as back-up to other team members.
- Develop and maintain a thorough working knowledge of assigned client relationships and accurately manage client data across all systems.
- Assist SWAs in client meeting prep and follow up including coordination of timely follow-up directly to client.
- Partner with SWA and Client Service Team during client onboarding process, to coordinate custodian paperwork, and facilitate transfers.
- Assist clients with implementation of recommendations, including working with their CPAs, attorneys and other professionals. Perform various financial planning analysis including gathering client information, creating and updating financial planning projections, and communicating recommendations.
- Ensure all client tasks, requests and communications are completed promptly and within established service standards.
- Participate in projects that help improve our team's policies, processes, and service delivery to clients.

BEACON POINTE HEADQUARTERS

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- Contribute to a professional and energetic hybrid working environment.

Qualifications

- 1 to 2+ years of relevant experience working with high-net worth individuals a plus; preferably with a Registered Investment Advisor (RIA), investment management firm, or broker/dealer.
- Bachelor's degree required, Finance, Business, Economics, Financial Planning, or a related field preferred
- Ideal candidate has a CFP® (or is working towards CFP® certification).
- Experience with Salesforce, Schwab, Fidelity, Tamarac and eMoney highly desired but not required.
- Exceptional organizational skills with a strong ability to prioritize and multi-task.
- Personable, responsive and engaging with a client first attitude.
- Mature, self-starting professional willing to take ownership of assigned responsibilities.
- Ability to work independently and take direction from multiple parties.
- Strong computer skills including advanced proficiency with Excel, PowerPoint and Word.
- Excellent written and verbal communication skills.

About Beacon Pointe Advisors

Beacon Pointe Advisors is one of the nation's largest Registered Investment Advisor firms with headquarters in Southern California and affiliate offices nationwide. Beacon Pointe provides advisory services to a range of clients, including institutions (i.e., endowments, foundations), high-net-worth individuals, and families. Beacon Pointe has been recognized by various industry publications including Forbes, Financial Advisor Magazine, Barron's, and more. For more information, please visit [Awards Disclosures](#).

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