At APCM Wealth Management for Individuals (AWMI), we are a team of smart, driven and capable professionals who enjoy autonomy and flexibility due to the respect we have for each other. Together we approach our work of defining team goals, and the tasks to achieve them, with energy and passion. Individuals' strengths and interests are fostered through continual professional development and mentoring. We are looking for a dedicated professional who values the trust instilled in us by our clients and thrives in a team environment.

Position: Associate Financial Advisor Level 4

AFA4	
Client Responsibilities	Interact with clients for onboarding; review meeting presentations; answering routine questions, service requests and financial planning with moderate supervision
Team Responsibilities	Willing to work in a team environment and be a great teammate Assist in training new team members and interns
Firm Responsibilities	Understand and support the firm's vision, mission and values Engage in teamwork and teambuilding and integrate into the culture of the firm
Growth Responsibilities	Support Lead Advisors, Senior Advisors and Directors by coordinating in research and projects for the current management and future growth of the firm
Degrees and Designations	Minimum Bachelor's degree from an accredited university or college and Series 65 License
Experience	Three to five years
Skills Required	Solid writing and presentation skills Robust knowledge of planning areas including financial planning, investments, budgeting, taxes, risk management and estate planning Mastery of the firm's core systems; Microsoft 365 and Office platform, Salesforce, and Orion Mastery of client service workflows and tasks Ability to perform advanced financial analysis Ability to trade with minimal supervision
Skills to Develop	Advanced knowledge market news, investment management and portfolio positioning Participate in identifying and adopting technology solutions Progress to contributing original ideas in client meetings Participate in community engagement Develop a professional network, Center of Influence (COI) base
Performance Measures	Advancement of technical skills Mastery of firm software, technology, workflows

	Adept soft skills related to client communications Progress toward completion of CFP® Designation program Participation in team dynamics
Compensation	Full-time salaried position with standard benefits package; 401(k) and Cash Balance Pension plans; incentive and discretionary bonus plan

Additional Details on Anticipated Responsibilities and Duties:

- Gather, organize, and synthesize client information for preparation of financial plans and strategies
- Coordinate with the clients' attorneys and CPAs, if needed to obtain information necessary to develop and complete the financial plan
- Organize client financial information and electronic case files, preparing reports, letters, and other correspondence, and completing special projects as appropriate
- Develop financial plans including alternatives and recommendations for Lead/Senior Advisor's review and client presentation
- Prepare for client review meetings, financial plan updates, portfolio reviews, gather client data/information, and implement recommendations
- Increasing participation and client meetings, assist in presenting financial plans and recommendations
- Assist with client asset management, including coordination of complete financial planning and wealth management integration (analysis, estate planning, tax strategies for assets under management, and portfolio rebalancing)
- Manage client relationships, including ongoing and regular client contact and communications. Interact with clients in person, over the phone, and email
- Participate in comprehensive financial planning for clients, including coordination of asset management, estate planning and risk management
- Master firm specific software, including MoneyGuide ProFP, Orion, and Salesforce
- Trade with minimal supervision
- Advanced technical writing skills by participating in APCM blog writing
- Attend team meetings, volunteering for research, new initiatives and management projects for the internal operation of the team

Career Path:

This position is expected to progress to Financial Advisor Level 1 (FA1) within 12 to 24 months. Mentoring will be provided to promote skills for excelling at your position, contributing to the business beyond standard job functions, and promoting your development.

Firm Values:

- Maximum benefit/minimal fees for the client is top priority
- We are industry experts with the highest credentials
- Work and life balance is part of our culture
- Profitable clients provide momentum for continued success
- An engaged team contributes to a great work environment