

ASSOCIATE ADVISOR

Location: Cleveland, Ohio

Benefits: Yes

Status: Full-time

JOB DESCRIPTION

Fairport & Luma Wealth are looking for an Associate Advisor responsible for maintaining our standard of client experience and represent our purpose of Inspiring Families. The Associate Advisor will be responsible for preparing core deliverables as part of holistic wealth management team, providing solutions to clients and their families. The Associate Advisor will serve as second or third chair on relationships with Advisors and Senior Advisors who have primary client responsibilities and may gain primary client responsibility over time.

DUTIES AND RESPONSIBILITIES

- Gain proficiency in all areas of financial planning including: education planning, retirement planning, estate planning, debt management, Medicare and Social Security, Investment strategy, foundational tax planning, and basic knowledge of estate/trust administration
- Prepare client core deliverables including asset allocation, cash flow, balance sheet, tax planning, and forward-looking financial planning
- Client meeting preparation
- Onboard clients to eMoney financial planning software
- Attend client meetings and present deliverables as requested by Advisor or Sr. Advisor
- Actively engage with clients to update goals, objectives, and implement recommended solutions
- Willing to participate in firm growth initiatives including support of our target market outreach

QUALIFICATIONS

- A four-year degree, with a professional designation or the desire to acquire a professional designation (CFP, CPA, etc.) a plus
- 0-3 years of experience with one year of working in a professional office environment
- Excellent written and verbal communication skills, as well as interpersonal skills
- A growth mindset with a commitment to lifelong learning and sharing
- An interest in holistic wealth management
- A commitment to client service and client experience

KEY COMPETENCIES

- Consistently embodies and lives out Fairport's core values – Empathy, Team Over Self, Engaged, Initiative, and Continuous Improvement
- A willingness to learn and ask questions
- A willingness to be visible in the communities/niches we serve and/or in other industry opportunities
- Client-centric
- Participation and teamwork in conjunction with corporate initiatives
- Adopts and attains proficiency in the technologies leveraged by the firm