Associate Wealth Advisor, Albion Financial Group – Salt Lake City

Albion Financial Group is an independent fee-only wealth management firm located in Salt Lake City. The firm was started 38 years ago in Alta, Utah. Today we are a team of 27 employees, work with approximately 500 families and have $1 billion in assets under management. Our mission at Albion Financial Group is to help our clients make a lifetime of good financial decisions.
Albion Financial Group is a progressive team-oriented workplace that prides itself on giving back to the community. We believe we can best serve our clients by using collective efforts. We provide professional development opportunities, ongoing training, and continuing education. We are seeking a team member to assist us in our mission of helping clients achieve their financial goals. This candidate will work directly with our Senior Wealth Advisors as well as other members of our team to provide the highest level of service to our clients. The Associate Wealth Advisor will help establish new client relationships in addition to providing advisory services and support to our existing high net worth clients. If you have a desire to be part of a successful team and share our vision, then we want to hear from you.

Duties and Responsibilities:

- Professionally communicate with high-net-worth clients (in writing, verbally, and in person)
- Manage client information and internal systems – collect, organize, and store client information and documents
- Participate and assist Senior Wealth Advisors with client meetings including preparation and follow-up
- Prepare and process account forms and applications, coordinate account transfers, deposits and distribution requests
- Provide general support to Senior Wealth Advisors and other team members
- Review, interpret and summarize client data including insurance contracts, tax returns and employee benefit information for input into planning software

Key Qualifications:

- Outstanding organization skills and ability to manage and balance multiple projects simultaneously
- Excellent verbal, written, presentation and interpersonal communication skills
- Self-starter, problem solver, and goal-oriented team player
- A genuine interest in serving and caring for clients. Strong interest in financial planning. A CFP® or working toward CFP® designation is a plus
- Experience with eMoney is preferred

Salary and benefits discussion upon interview.

Please send resume via email to: Zenfira Holm, zen@albionfinancial.com