

## About this Job

Will work with a seasoned wealth manager, learning the processes of wealth management. Duties include attending meetings with clients, taking notes, following up on service items, etc.... Will have contact with clients in following up on service issues. Employee will be trained on the skills necessary to become a successful para-planner.

## About Axio Wealth Management

We work with successful business owners, executives and families to go beyond typical investment planning. We provide the collective perspective of a team, rather than just one individual's advice, in helping achieve our client's goals. Our client's teams are led by an experienced wealth manager who will coordinate with other professionals in evaluating all aspects of the client's finances--including tax professionals, disability and life insurance specialists, estate attorneys, risk management specialist, etc... Because we were founded to help successful families achieve all that is important to them, we strive to work with professionals who also have expertise in their related fields.

## Location

1145 South 800 East, Orem, Utah 84097, United States

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## Compensation

TYPE

Paid

PAY RATE

Not Specified

DURATION

Permanent

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## Company Details

COMPANY SIZE

1 - 10 employees

INDUSTRY

Investment / Portfolio Management industry

COMPANY TYPE

Unknown

HEADQUARTERS

1145 S 800 E, Orem, Utah 84097, United States

WEBSITE

<https://www.axiowm.com>

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## Employer Preferences

ALLOWED SCHOOL YEARS

Sophomore and Junior

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## Contact Information


CONTACTS

Robert Shelton

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**ROBERT SHELTON** | Wealth Manager  
Axio Wealth Management

 [801-717-9237](tel:801-717-9237)

 [rob@axiowm.com](mailto:rob@axiowm.com)

 [www.axiowm.com](http://www.axiowm.com)

[1145 South 800 East Suite 101](#)  
[First Floor Orem, UT 84097](#)