

## Job Description

We are currently seeking qualified candidates to join Beacon Pointe Advisors as an Associate Wealth Advisor in our Greenwood Village office. The ideal candidate will work closely with the firm's Wealth Advisors and Senior Wealth Advisors and assist in providing client advisory and investment management to the firm's sophisticated, high net worth individual and family clients. This position will provide the successful hire with the opportunity to grow into a Wealth Advisor based on successful performance in critical job functions.

## Responsibilities

- Providing thorough and timely follow-up related to actionable items from client meetings and day-to-day client needs as they arise.
- Participating in client meetings to develop an understanding of and provide advice regarding their financial situation, goals, and objectives.
- Preparing for client meetings, including development of agendas, reports, and other items that may be needed for each meeting.
- Directly supporting the firm's advisors in daily aspects of client service, advice-giving, and financial planning. The role will entail frequent communication, both verbally and in writing.
- Coordinating the timely investment and review of new client accounts based on internal guidelines related to portfolio construction and risk management.
- Supporting the firm's business development efforts as opportunities arise.

## Qualifications

- Four-year college degree in a related field (e.g., B.S. in Finance, Business, Accounting, or Economics)
- At least 2+ years of professional industry experience, with a strong preference for financial planning-related experience and/or CFP<sup>TM</sup> or personal tax-related coursework
- Excellent written and verbal communication skills
- Exceptional attention to detail with strong organizational, analytical, and interpersonal skills
- Highly motivated, with a great work ethic and desire to learn and grow
- Ability to comport themselves in a warm but professional manner-able to connect with clients
- Proficiency in Microsoft Office applications — especially Excel — is a must.

## About Beacon Pointe Advisors

Beacon Pointe Advisors is a Southern California-based multi-billion-dollar Registered Investment Advisor with affiliate offices nationwide. The firm provides clear and objective investment advice, solely advocating for our diverse group of clients including high-net-worth individuals and families and institutional investors, including endowments and foundations. Our advisors' extensive expertise and strong commitment to our clients are evidenced by the firm's numerous awards and recognition in publications including *Bloomberg*, *Forbes*, *Financial Advisor Magazine*, *CNBC*, *Barron's*, and more. For more information, please visit [www.beaconpointe.com](http://www.beaconpointe.com).

Salary Range: \$65,000 to \$85,000

**Interested Candidates:** Please send resumes to Sean Curley at [SCurley@BeaconPointe.com](mailto:SCurley@BeaconPointe.com).