ABOUT PETERSON WEALTH ADVISORS

Peterson Wealth Advisors is an established fee-only RIA located in Orem, Utah, specializing in the management of retirement assets for clients using our proprietary Perennial Income Model™. This approach matches our client's investments with their future income needs providing them with peace of mind in knowing they have an income plan through their retirement years. We also provide tax, estate, and financial planning for our clients.

The members of the firm work in a team environment that encourages innovation, learning, a passion to serve their clients, and helping others in the firm grow. This is an ideal opportunity for someone with 2-5 years of experience and aspirations to be a client facing Senior Advisor in the future.

RESPONSIBILITIES

- Work directly with the firm's Senior Advisors in serving new and existing clients.
- Participate in client meetings from the outset, taking ownership of the client meeting preparation, and post-meeting review process.
- Create and update financial plans for clients in alignment with their goals and values.
- Work with Senior Advisors to implement the financial planning and investment solutions.
- Be an active firm member by continuing to build a best-in practice firm focused on clients and helping each other grow. No business development requirements.

QUALIFICATIONS

- Bachelors' degree in financial planning, accounting, or related field from an accredited university.
- 2+ years experience in financial planning, finance, or related field. Current CFP®, CFP® candidate, or pursuing CFP® certification, preferred.
- Strong written and verbal communication skills. Accuracy, attention to detail, organized, and strong problem-solving skills.
- A proactive "can do" attitude to do whatever it takes to serve the client. A sincere commitment to the financial planning profession and entrepreneurial mindset.

PERKS

Career-track growth opportunity, due to firm's rapid growth. Compensation package includes salary, retirement plan with company match and profit sharing, paid time off, and weekly team lunch. Company-supported opportunities for attending conferences, obtaining additional education/certifications, training, and career growth—all structured to incentivize a collaborative team environment. Mentorship from founder and multiple Senior Advisors.

Please contact christine@petersonwealth.com with a resume if interested.