Full Time Associate Advisor in Orem, Utah

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 clients' current investments with their future income needs, providing them with peace of mind knowing they have an income plan throughout their retirement. We also provide tax planning, estate planning, and various other financial strategies 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 aspirations to be a client-facing Lead Advisor in the future.

RESPONSIBILITIES

- Work directly with the firm's Lead Advisors in serving new and existing clients.
- Participate in client meetings from the start, 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 Lead Advisors to implement 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

- Bachelor's degree in financial planning, accounting, or related field from an accredited university.
- 0-3 years' experience in financial planning, finance, accounting, 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.
- Competitive salary + bonus.
- 401(k) retirement plan with 6% company match.
- 12 paid holidays, 17 days of paid time off.
- Health, dental, and vision insurance.
- Paid paternity/maternity leave.
- Company-supported opportunities for additional education, certifications (CFP®, Series 65, etc.), conferences, and other career growth training.
- Mentorship from founder and multiple Lead Advisors.
- Miscellaneous: Company Topgolf membership, weekly team lunch, quarterly team activities, Costco membership. Work schedule is Mon – Fri, 9 am – 5 pm.

INSTRUCTIONS FOR APPLYING

Resumes will not be accepted without a cover letter that states why you would be a good fit for this position. Also in your cover letter, please describe your three most defining characteristics or attributes.

Please send resume and cover letter to careers@petersonwealth.com in Word or PDF format.

This position will start between mid-January and early February depending on your availability.

We will hold the first round of interviews from December 11-21st.