



Advanced Retirement Strategies
562 N Main St Ste 100
Kaysville, UT 84037

Position Title: Associate Financial Advisor (Internship or Full-Time Hire)

Location: In-office at 562 N Main St, Kaysville, UT 84037

Company Description

Advanced Retirement Strategies is a registered investment advisory firm based in Kaysville, Utah, dedicated to helping individuals and families who have spent a lifetime accumulating assets protect, allocate, and distribute those assets to remain financially independent. As CERTIFIED FINANCIAL PLANNERS®, we take a comprehensive, fiduciary approach to financial planning, including retirement, investment, tax, insurance, and estate strategies

Position Description

We are seeking a passionate individual pursuing a career in financial planning. In this role, you will work closely with senior advisors to support client relationships, develop financial plans, and contribute to the firm's overall success. This role offers flexibility for candidates to potentially begin as interns or full-time hires.

Key Responsibilities

- Assist in the development and implementation of comprehensive financial plans
- Prepare and review client reports, presentations, and meeting documentation
- Participate in client meetings alongside senior advisors—taking notes and tracking action items
- Maintain accurate and up-to-date client records in Salesforce
- Support preparation for key seasonal surge meetings (spring and fall)

Qualifications

- Bachelor's degree (or current pursuit) in Finance, Economics, Business, or a related field
- 0–2 years of relevant experience
- Strong analytical skills and keen attention to detail
- Excellent verbal and written communication skills
- Proficiency with Microsoft Office Suite
- Experience with MoneyGuidePro, Holistiplan, and Salesforce is a plus

What We Offer

- Supportive and collaborative working environment
- Hands-on experience learning the craft of financial planning

LOCAL: 385.249.5650

TOLL-FREE: 888.299.6291

FAX: 385.249.5641

advancedretirementstrategies.com



Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor. Carson Partners, a division of CWM, LLC, is a nationwide partnership of advisors. 01308579_031822_CP

- Competitive compensation with bonus potential plus 401(k) match

How to Apply

Submit your resume via **Handshake** or email to **russ@arsplanners.com**. A cover letter explaining your interest and career goals is welcomed.

Questions to include

- Preferred start time frame? (e.g., Summer/Fall)
- Are you looking to begin immediately as a full-time hire or intern?

