ASSOCIATE WEALTH ADVISOR

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. Our expanding team implements a team-based approach to servicing our clients across two business segments: Wealth Management and Asset Management. We are currently looking for an Associate Wealth Advisor (AWA) to join our advisor team and grow with the firm as we continue to expand and serve our clients.

JOB SUMMARY

As an Associate Wealth Advisor, you will be a part of the firm's advisor team. This position is onsite, located at our office in Guilford, CT. This role represents the next step in our career track progression from the Financial Planning Associate role. In this role, you will conduct both comprehensive and targeted financial needs analyses using the firm's financial planning software, while supporting and managing client relationships through ongoing communication. With mentorship from our advisor team, you will help clients track progress toward and advance their financial goals and objectives established through our financial planning process.

Additionally, in this role, you will be responsible for supporting our Wealth Advisors by developing in-depth investment policy statements and maintaining ongoing communication with the Asset Management team to ensure that clients' investment needs and objectives are met. We are seeking a dedicated individual committed to building a career as a Wealth Advisor and growing their expertise within an RIA firm.

KEY ACCOUNTABILITIES

- Prepare comprehensive and targeted financial planning analyses using the firm's financial planning software.
- Organize and interpret financial information obtained from clients within the financial planning process.
- Develop in-depth investment policy statements and maintain close communication with the Asset Management team.
- Collaborate with advisors, client service, and asset management teams to support the firm's team-based approach.
- Communicate effectively with clients to ensure transparency regarding their financial goals, update them on actively managed accounts, and deliver high-quality advice.
- Retain and strengthen the client base through quality relationship management.
- Expand client base by identifying new opportunities with existing clients, leveraging networking events, and obtaining referrals from centers of influence.
- Monitor industry and regulatory updates, economic trends, financial markets, and cybersecurity threats.

QUALIFICATIONS

- Exhibit emotional intelligence to assist clients in achieving their goals throughout all stages of life.
- Be an active listener and communicator, able to connect easily with others and build trusted, long-lasting relationships.
- Possess advanced analytical skills with a keen attention to detail, accuracy, and deadlines.
- Demonstrate a fiduciary mindset and uphold confidentiality in all matters.
- Exemplify strong organizational skills to manage multiple tasks effectively.
- Dedicated to a career as a Wealth Advisor, with a commitment to pursue the CFP® designation or currently pursuing.
- Ability to multi-task and have strong prioritization skills
- Capable of working both independently and as part of a team
- Flexible and adaptable to tight deadlines and evolving client needs

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- 3+ years of experience supporting clients within the financial services industry, preferably in a client service, financial planning or advisory position.
- CERTIFIED FINANCIAL PLANNER™ (CFP®) or committed to pursuing the path to be a CFP®
- BA/BS degree
- Proficient in Microsoft Office and financial planning software

HOW TO APPLY

For further inquiry, please email **madelyn.monte@montefinancialgroup.com** with an attachment of your resume as a PDF.

For additional company information you may find us on **LinkedIn** or on our **Website**.

All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.