PATHFINDER
WEALTH CONSULTING

Associate Wealth Advisor Job Posting

Pathfinder Wealth Consulting is an independent financial planning and investment advisory firm. Our team consists of a group of intelligent, hard-working professionals, and we are looking to add an Associate Wealth Advisor (AWA) to our Wilmington, NC office. This is an in-office position.

The AWA's primary responsibility is to manage and service existing client relationships from the firm's four Wealth Advisors. The AWA will also be involved with onboarding new relationships.

Our ideal candidate has a broad and deep understanding of sophisticated wealth management practices and investment strategies. They are a friendly, goal-oriented professional who has outstanding communication, time management, and leadership skills. They must be proactive and committed to continued industry education. They are comfortable and proficient with various technology platforms, especially Excel and financial planning software. The ideal candidate is highly organized, self-driven, and has a excellent attention to detail. Most importantly, this person will be confident and comfortable meeting directly with our clients, whom we cherish and serve diligently.

Job Responsibilities

- Manage relationships with select clients and perform client reviews for Wealth Advisor(s).
- Record notes by attending select client meetings with the Wealth Advisor(s).
- Preparing and following up with clients to execute tasks derived from client meetings.
- Involved in the development and onboarding of new client relationships.
- Ongoing financial plan development, analysis, and updates utilizing firm's planning process.
- Field client questions, via phone or email, related to planning and investment issues.
- Support Wealth Advisors in daily responsibilities.
- Train, educate, and mentor Financial Planning Associates.
- Participate in marketing and branding initiatives.
- Trade and rebalance client portfolios using appropriate tools.

Knowledge and Experience:

- BA or BS (Finance, Economics, or Business-related field preferred)
- Series 65 or 66 (Investment Advisor License)
- Insurance licenses (Accident & Health, Life, Medicare & Long-term Care)
- Certified Financial Planner™ designation (CFP®)
- 5+ years of industry experience

Skills and Competencies:

- Emotional intelligence to relate and communicate with clients throughout life transitions
- Patient and sociable team player
- Proficient at public speaking
- Hungry, humble, and smart
- Demonstrate shared values and earn trusted advisor status within the firm

Salary: Base salary determined by experience and professional credentials.

Contact: Please submit resume to careers@pathfinderwc.com. Cover letter required.

Pathfinder Wealth Consulting is committed to building a more diverse and inclusive workplace by making intentional efforts to source the very best talent from a variety of backgrounds. Candidates from groups underrepresented in the financial services industry are encouraged to apply.