

Barton Spector Wealth Strategies - Wealth Advisor Scottsdale, Arizona

JOB SUMMARY/DESCRIPTION

Barton Spector Wealth Strategies is an established, collaborative practice with long-lasting client relationships that is centered around financial planning with a focus on client communication and education. As a result of our success and our plans to sustain an enduring firm that is multi-generational, we are seeking a new Wealth Advisor to join our practice and be a part of the long-term, continued success we enjoy.

The ideal candidate for this role will bring to BSWs a client-centric, collaborative approach to financial planning and investment strategies. You will be mentored and trained by the principals of BSWs who will be focused on setting you up for success in their existing business model. We are seeking a committed, enthusiastic, experienced individual who is eager to add their expertise and client-focused approach to the overall success of the firm.

The Wealth Advisor will manage existing client relationships, either working with a more experienced advisor or independently. The candidate will also be responsible for developing new client relationships/opportunities. The candidate will formulate and implement advice and may also utilize outside specialists to develop recommendations for clients. This candidate will be responsible for actively managing client portfolios under the guidelines developed by the firm Partners and will also participate in developing investment strategy and decisions.

RESPONSIBILITIES FOR THIS POSITION INCLUDE, BUT ARE NOT LIMITED TO:

- Client service, including planning updates, portfolio changes and reviews, information data gathering, portfolio returns, money movement and account maintenance, and new opportunity identification
- Client relationship management, including ongoing and regular client contact and communications
- Client asset management, including coordination of complete financial planning and wealth management (analysis, estate planning, tax strategies for assets under management, and portfolio management)
- Ability to independently engage, implement, and manage financial planning and investment processes including all analysis without direct oversight
- New business development through networking, relationship building, and other opportunities to spread the word about BSWs and generate new business opportunities
- Contribution to the Firm's public image through published writings, speeches, professional association involvement or other means to be recognized at a high level both within and outside of the profession

QUALIFICATIONS

- Bachelor's degree from an accredited college or university required
- CFP designation and/or advanced degree in relevant field (MBA, J.D., etc.) desired
- 3-5 + years of experience in comprehensive financial planning and investment management with demonstrated ability to develop and manage plans and manage client relationships
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as financial planning, client relationship management (CRM), and portfolio management (PM) software
- Financial planning/wealth management acumen, judgment, and experience
- Excellent communication and listening skills. Desire/ability to work successfully in a small company team environment where it is expected that you will wear many hats with varied responsibilities
- Strong presentation skills, self-confidence, personal integrity, and an understanding of fiduciary responsibility
- A team player, with strong leadership and mentoring skills and ability to multi-task and manage time effectively
- Strategic thinking and a natural talent for networking, relationship management, client service, and investment knowledge
- Detail-oriented focus and a professional demeanor
- Desire to obtain long-term employment

SALARY AND BENEFITS

Pay/benefits are competitive based on industry standards. BSWs offers a 401k defined contribution plan with company safe harbor match available. In addition, we offer employee-paid group health insurance, other group benefits and paid time off.

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, or disability status. All inquiries will be kept confidential.

BSWS is located in Scottsdale, Arizona near the Kierland Commons shopping center. We are close to State Route 51 and the 101 Freeways. Local candidates preferred, as there are no relocation cost benefits.

For more information, please contact Jay R. Spector, CFP® at (480) 409-5922 or at jay@bartonspectorwealth.com. The firm's website is: www.bartonspectorwealth.com.