Barton Spector Wealth Strategies - Wealth Advisor Trainee
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 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 Trainee** to join our practice and be a part of the long-term continued success we enjoy.

PAID TRAINING
Benefit from a formal training program that will prepare you for success as a Wealth Advisor in the Independent Financial Advisor space. You will participate in a structured, 12-month program where you will achieve:

1. Obtaining your licenses
2. Learn Products & Platforms
3. Sales Training
4. Advanced Planning Knowledge

JOB OVERVIEW
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 by the principals of BSWS alongside your formal training program, who will be focused on setting you up for success in their existing business model. Once fully trained and familiar with the BSWS process, you will become an official advisor with the practice focused on both existing clients and developing new business.

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

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, retirement income 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 preferred (upcoming graduates are welcome to apply!)
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as financial planning, client relationship management (CRM), and portfolio management (PM) software
- Excellent communication and listening skills. Desire/ability to work successfully in a small company environment where it is expected that you will wear many hats with varied responsibilities
- Strong presentation skills, self-confidence, and personal integrity
- Detail-oriented focus and a professional demeanor
- Desire to obtain long-term employment

COMPENSATION AND BENEFITS
We offer a competitive compensation package that includes base salary during your 12-month training program, access to a suite of health and ancillary benefits coverage, and a 401(k) defined contribution plan with company safe harbor match available.

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 in Scottsdale, Arizona near the Kierland Commons shopping center. We are close to State Route 51 and the 101 Freeways. Local candidates only as there are no relocation costs.

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.