Associate Advisor

Associate Advisor Job Description

I. MISSION

Founded in 1989, Burton Enright Welch (BEW) is an independent, fee-only financial planning and investment management firm in Walnut Creek, CA with over $1 billion in assets under management.

BEW seeks an Associate Advisor who is eager to learn, intellectually curious, and will succeed in a culture that promotes collaboration, initiative, and professional growth. The Associate Advisor will work with BEW Advisors and Lead Advisors to provide financial planning and investment management for BEW's clients.

The Associate Advisor is not expected to bring in business. Long-term, BEW expects the Associate Advisor to progress to an Advisor, which would include greater responsibility in leading meetings, acting as a financial planning subject matter expert, and serving as the primary point of contact with clients.

II. RESPONSIBILITIES

- Support Advisors and Lead Advisors on day-to-day client needs.
  - Client communications are clear, prompt, responsive, and courteous
  - Works with firm resources for effective delivery of client deliverables
- Assist in preparing for client meetings, taking notes, and sending follow-up emails.
- Create/update financial plans to monitor whether clients are on track to meet their goals
- Analyze financial planning strategies (e.g., tax planning, retirement spending, equity compensation) and work with Advisor/Lead Advisor to develop recommendations.
- Maintain client records, utilize workflows, and monitor outstanding tasks in CRM.
- Manage team organization and execution of team tasks and projects
- Collaborate with the Client Services Team on service requests and new client onboarding to ensure a seamless client experience.
- Participate in project and committee work, including Investment Committee and Financial Planning initiatives
- Support and adhere to client experience standards and compliance requirements.

III. QUALIFICATIONS

Experience and Education:

- Bachelor's degree
- 2-4 years of experience in the financial services industry
- Demonstrated desire or progress towards the CFP® designation.
- CPA and CFA designations are also welcome.
- Experience with financial planning software (e.g., eMoney) a plus

Skills and Knowledge:

- Detailed-oriented and highly organized
- Completes work timely and accurately
- Ability to prioritize and manage multiples tasks and client relationships
- Self-starter who values continuous learning
- Excellent communicator (verbal, written, listening)
- Strong interpersonal skills (integrity, humility, respect, empathy)
- Core knowledge of financial planning concepts, markets, and investment topics
- Team player who can work effectively in a collaborative environment
- Proficient in Microsoft Office Suite
- Past use of a CRM system a plus

IV. COMPENSATION

- Competitive salary based on experience
- Quarterly Incentive Bonus program
- Comprehensive benefits package: medical, dental, vision, life and disability insurance, etc.
- Open PTO (Paid Time Off) policy
- Continuing Education allowance
- 401(k) retirement plan, including company-funded contributions

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