Associate Wealth Manager

The Associate Wealth Manager works closely with a Senior Wealth Manager in the preparation and implementation of client financial strategies, plans, and analysis. They will be given challenging and exciting responsibilities and are responsible for leading select client cases. The Associate Wealth Manager will be the main point of contact for client correspondence and help develop and maintain client relationships.

Why Willis Johnson & Associates?

Willis Johnson & Associates is a fast growing, award winning, wealth management firm specializing in corporate executives and professionals. We help our clients optimize everything in their personal financial lives from compensation and benefit strategy to tax mitigation, from retirement planning to investments and insurance. And with everything we recommend, we put our clients first—all the time, every time. No product sales. No commissions. Straight fee based financial planning and asset management.

The same way we take care of our clients, we invest in our team. Aside from providing a very competitive benefits package including medical, dental, vision, disability/life insurance, 401(k), and PTO, we pride ourselves in supporting personal and professional growth. We encourage and incentivize continued education for all employees and support their participation in educational conferences and events.

Essential Responsibilities

- Input data into financial planning software
- Prepare comprehensive financial plans, reviews, reports and client presentations
- Prepare Senior Advisor and staff in advance to client meetings
- Manage assigned client cases, taking full ownership and responsibility for all client contact, including preparation of meeting agendas, client correspondence, quarterbacking all tasks to completion
- Lead select client meetings, present plans and reviews, take detailed notes, debrief and assign appropriate actions to staff
- Implement approved financial plans and investment strategies
- Develop and deepen client and prospect relationships
- Respond directly to client requests
- May perform basic investment research and research client's company benefits
- Attend weekly Wealth Management meetings and bi-monthly Investment Team meetings.

Qualifications

- Bachelor's degree in Finance, Business, Accounting or Financial Planning required
- Master's or Graduate degree preferred (Masters in Finance, JD, MBA)
- Three or more years working experience in similar industry
- Currently pursuing either CFP, CFA, or CPA designation
- Currently possess or pursuing the Series 65 securities licenses
- Strong technical and interpersonal skills
- Confident, poised and professional in appearance
- Ability to take on creative challenges and manage workload on tight deadlines
- Ability to collaborate and contribute to a team environment

To Apply- Because we are looking for an exceptional candidate to be the next member of our team, our entire advisory staff participates in the selection process. To apply, please email your resume and cover letter to jobs@wjohnsonassociates.com with your full name, followed by "Associate Wealth Manager" in the subject line.