

# Associate Wealth Advisor – Fairport Wealth

## Hightower Advisors

### Cherry Hill, NJ

#### Your Future Team

Fairport Wealth is a values-based, purpose-driven organization that inspires over 2000 families with comprehensive wealth management solutions. Headquartered in Cleveland, Ohio, we serve clients in six regional offices and are strengthened by the resources of Hightower Advisors. Our roots date back to a multi-generational business, and we continue to thrive as a supportive, family-oriented organization. Over six decades, we have thoughtfully incorporated teams with visionary founders, each bringing diverse talents, all of whom looked to put the client first.

#### Job Summary

The Associate Wealth Advisor contributes to the team's efforts in the understanding of clients' goals and objectives and in developing personalized, comprehensive financial solutions to help achieve clients' desired outcomes. The Associate Wealth Advisor plays an important role in inspiring families, driving financial success and developing strong connections with our clients. You will report to the Director of Wealth. #LI-Onsite

#### What You'll Do

- Support multiple aspects of preparation, development, and implementation of financial plans
- Support us in the daily operations including trade support, account reconciliations, cash management, data administration, performance reporting and billing
- Work together with the team to provide superior client service
- Support the team with other ad hoc tasks
- Contribute to the development and maintenance of our policies and procedures with the goal of achieving and maintaining industry best practices
- Assist with Client meeting preparation, including scheduling, data collection, quality control.
- Work closely with the entire Fairport Wealth team to ensure alignment between each client's Plan and implementation strategy.

#### Experience and Qualifications

- Bachelor's degree in finance or related field
- CFP or Series 65 or 66 preferred or in progress
- 2-7 years of experience in the financial services industry in a client relationship position.
- Excellent written and verbal communication skills, and interpersonal skills.
- Ability to operate independently in dealing with broad concepts and manage multiple priorities
- Knowledge of different investment and financial planning topics and a commitment to client service
- Ability to become proficient in the use of client relationship management and comprehensive financial planning software and technologies
- Experience with industry specific software preferred
- A team player with a growth mindset and a commitment to lifelong learning and sharing

#### Company Culture

Embracing our core values is crucial for an Associate Wealth Advisor, as these values form the foundation for promoting a positive workplace culture. Incorporating these values into daily operations is important for enhancing productivity, building strong client relationships, and nurturing an atmosphere of trust and growth.

#### Team over Self:

- Collaborative mindset
- Contributor to the greater good

## Associate Wealth Advisor – Fairport Wealth

- Sense of shared purpose

### **Engaged:**

- Understanding of goals
- Aim to do the best
- Big-picture thinking
- Thoughtfulness in actions

### **Initiative:**

- Proactive assistance and insight
- Solutions-oriented approach
- Continuous Improvement:
- Commitment to excellence
- Embrace growth opportunities

### **Empathetic:**

- Service-oriented mindset
- Put oneself in the shoes of clients (internal or external)

### **What We Offer**

- Coverage on the first day of employment for Medical, Dental, and Vision insurance
- Paid Parental Leave (16 weeks for primary caregiver and 8 weeks for secondary caregiver)
- 401k Matching Plan
- HSA Employer Contributions
- Student Loan Assistance
- Pet Insurance

AN EQUAL OPPORTUNITY EMPLOYER: Hightower is an equal opportunity employer and does not discriminate based on race, color, religion, sex, sexual orientation, pregnancy, marital status, national origin, citizenship, veteran status, ancestry, age (over 40), physical or mental disability, medical condition (cancer-related), gender identity or expression, genetic information including sickle cell or hemoglobin C trait, or any other consideration made unlawful by applicable federal, state, or local law.

*You are a U.S. citizen, U.S. permanent resident or have other unrestricted U.S. work authorization and will not require sponsorship for U.S. work authorization now or anytime in the future*