

Wealth Advisor – Buffalo, NY

Your Future Team:

Fairport Wealth is a values-based, purpose-driven practice that inspires over 2000 families as of 2025 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 practice. 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 Wealth Advisor in Buffalo, NY engages with clients to understand their financial goals, provide tailored recommendations, and collaborates with our Investment Team to develop long-term strategies. The Wealth Advisor plays a vital role in inspiring families, driving financial success and developing strong connections with our clients.

Main Accountabilities:

- Provide holistic wealth management solutions to clients and their families, while adhering to the practice's standard of client experience.
- Develop personalized financial solutions aligned with clients' goals and objectives, demonstrating deep understanding in various areas such as insurance, retirement planning, estate planning, and tax planning.
- Actively engage with clients to update goals and objectives and implement appropriate recommended solutions.
- Proficiently manage client meetings, including preparation and facilitation.
- Collaborate with the Investment Team to develop long-term investment strategies to help meet clients' goals and objectives.
- Support growth initiatives by identifying, exploring, and closing share-of-wallet opportunities with existing clients.

Experience and Qualifications:

- Bachelor's degree in finance or related field.
- CFP or CFA certification preferred.
- 5+ years of experience in the financial services industry in a client relationship position.
- Excellent written and verbal communication skills, as well as interpersonal skills.
- Proficiency in client relationship management and comprehensive financial planning software and technologies
- Experience with investment management and financial planning topics
- A growth mindset with a commitment to lifelong learning and sharing

Company Culture:

Embracing our core values is crucial for a 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
- Sense of shared purpose

FAIRPORT WEALTH

Engaged:

- Understanding of goals
- Strive 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 upon 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 possess other unrestricted U.S. work authorization and will not require sponsorship for U.S. work authorization now or anytime in the future