Job Description

Ritholtz Wealth Management is a fast-growing wealth management firm based in New York City with clients and staff located across the country. We are a cutting-edge Registered Investment Advisory (RIA) firm serving more than 1,500 client households, actively seeking highly motivated Associate Advisors to join our team. The Associate Advisor position is a support role that assists their assigned Financial Advisor (s).

The candidate will be a part of the Associate Advisor program within our thriving and fast-growing wealth management firm. Our ideal candidate is client-service orientated and a team player who desires to grow into an Advisor role. The Associate Advisor will participate in client meetings, but not in advice delivering capacity. In addition, this position has limited decision-making authority on client matters.

The position is remote / work-from-home. However, we have employees located in all regions of the country, so in-person collaboration and some travel will be part of the role.

Responsibilities

In this role, you will be expected to:

- Support Lead Advisors with client retention, inquiries, processing of new business and client communications
- Day-to-day monitoring and administration of client accounts utilizing various custodians (*Charles Schwab, TD Ameritrade, Fidelity, and subadvisors*), the Orion account management and financial planning platform, and MoneyGuide Pro.
- Handle all administrative tasks necessary to provide the ultimate client experience and delegate all operational tasks to assigned client service team members.
- Assist in developing and monitoring client investment portfolios
- Upkeep of client data and maintenance of CRM system to ensure all data is correct and accurate
- Enter and analyze data within our financial software program
- Facilitates/executes client transaction requests
- Other duties and special projects as assigned.

The ideal candidate is:

- Detail-oriented and passionate about helping clients

- Process-driven and at ease with technology and client account
- Ability to work in a high paced environment with tight deadlines where accuracy is paramount
- A fast learner capable of following instructions, accepting constructive feedback, and meeting deadlines
- Is comfortable collaborating with many different teams and roles

Qualifications

- Certified Financial Planner - CFP - Certified Financial Planner Board of Standards, Inc
- Undergraduate degree in business, economics or equivalent work experience in the financial services industry is required
- Previous experience with financial planning, trust accounting and/or CRM software tools highly preferred
- Excellent written communication skills
- Strong computer skills, including Salesforce, Word, Excel & G Suite