Support Advisor
Career Opportunity

WealthPoint Advisors provides fee-only wealth management and financial planning services to high net-worth individuals, retirement plans, corporations and non-profit organizations. We are located in Indianapolis, IN and are looking to add a committed and driven individual to our growing firm.

Position Description

The Support Advisor is a full time client relationship management position that provides technical support for the Wealth Management Advisor and/or Client Service Administrator. Responsibilities include financial plan data gathering, modeling, case design, scenario building, plan development, and presentation development, as well as duties related to back office operations. The position may participate in client meetings but not in an advice or decision-making capacity.

Duties and Responsibilities

The Support Advisor can expect to focus in the following areas:

- Gather, organize and synthesize client data within a financial planning context
- Prepare client financial plans and presentations for review by supervisor
- Prepare financial scenarios
- Investment research and due diligence
- Attend client meetings in a technical and support role
- Investment plan implementation and monitoring

Qualifications

The Support Advisor position typically requires the following qualifications:

- Bachelor's Degree from an accredited college or university
- Finance or Accounting professional with 1-4 years experience
- CFP® or CPA designation preferred
- Series 65 license in good standing
- Proficiency with Word, Excel, PowerPoint and Outlook
- Detail-oriented, accurate, organized, able to set priorities
- Strong written and verbal communication skills
- Self-starter, takes initiative
- Team player, collaborative, able to work with and through others
- Desire/ability to work successfully in a small company environment

Salary and Benefits

Pay/benefits are competitive based on industry standards. Benefits include: 401(k) with company matching program, paid vacation, paid holidays. Partial and/or full financial support will be provided for professional accreditation/continuing education requirements and other education/training opportunities.

For confidential consideration, please forward your resume to:
WealthPoint Advisors, 8335 Allison Pointe Trail, Suite 135, Indianapolis, IN 46250, Attention: Lynn Thompson or lthompson@wealthpointadv.com.

WealthPoint Advisors, LLC is an Equal Opportunity Employer