



Associate Financial Advisor – Boulder, CO

Confluence Financial Advisors (CFA) is a fee-only financial advisory and investment management firm. We are hiring to help us continue providing our clients with great service as we grow. Our Associate Financial Advisor (AFA) will provide technical financial planning and investment management work under the guidance and supervision of the firm's partners. We are looking for candidates who fit our work hard/play harder culture.

General Job Functions/Responsibilities

As a valuable member of our team, you will:

- * Participate in client meetings with the firm's partners and build sound relationships with clients.
- * Prepare and make recommendations for client financial plans, including entering data and running appropriate reports using financial planning software.
- * Prepare and make recommendations on client investments, including the creation of investment policy statements and portfolio allocation reports.
- * Analyze client tax returns and make recommendations for tax-saving measures.
- * Analyze client insurance policies and prepare recommendations.
- * Schedule and confirm client appointments. Request appropriate documents from clients and support preparation for meetings.
- * Maintain client information in Client Relationship Management (CRM) system.
- * Assist with all non-advisory questions and paperwork, including processing forms and applications for investment accounts and related forms for business transactions.
- * Track client service issues and new business transactions in progress and report status.

What You Offer

- *Positive attitude and professional demeanor, optimistic, curious, and genuine.
- *Strong attention to detail and follow-through.
- *Self-starter, able to work independently, willing to learn and take on additional responsibilities as needed to help deliver outstanding service to our clients.

Job Skills and Requirements

- *Bachelor's degree required.
- *2+ years previous experience in financial services, accounting, or similar field strongly preferred.
- *CFP® desirable. At a minimum, coursework toward CFP® certification in progress. Series 65 License a plus.
- *Skilled user of Microsoft Office. Experience with financial planning software desirable.
- *Background check required.

What We Offer

- No product sales or dialing for dollars. We're fiduciaries so we work in the best interest of our clients.
- Yes, we have a company ski day!
- And a give-back day, flex-time, PTO, 401k, health insurance, and other benefits.
- A career path that rewards performance.
- This is a full time salaried position with additional performance-based bonus opportunities.

To apply, please submit your resume in PDF form to Careers@ConfluenceFA.com. Include **AFA Position** in subject line. In your email, include 2-3 sentences about why you are interested in the position.

Confluence Financial Advisors is located at 3800 Arapahoe Road Suite 210 Boulder, CO 80303.
www.ConfluenceFinancialAdvisors.com