CONFLUENCE
FINANCIAL ADVISORS

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 Financial Advisor (FA) will provide technical financial planning and investment management expertise independently to clients and also 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, review, and present client financial planning recommendations without supervision after a preliminary period
* Perform trades on behalf of clients
* Provide outstanding service to clients with a particular focus on client satisfaction and retention
* Enter data and run appropriate reports using financial planning, tax planning, and other software.
* Prepare and make recommendations on client investments, including the creation of investment policy statements and portfolio allocation reports.
* Meet with prospective clients to describe our services, determine if there is a good fit, and begin the onboarding process
* Analyze client tax returns and make recommendations for tax-saving measures.
* Analyze client insurance policies and prepare recommendations.
* Request appropriate documents from clients and support preparation for meetings.
* Maintain client information in Client Relationship Management (CRM) system.
* Assist with all client questions and paperwork, including processing forms and applications for investment accounts and related forms for business transactions.
* Delegate and supervise paraplanning and administrative work done on behalf of your clients
* 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.
*Experience working with a team-based approach to client service

Job Skills and Requirements

*Bachelor's degree required with preference toward those with a good academic record in a relevant field.
*3+ years previous experience in financial services, accounting, or similar field strongly preferred.
*CFP® preferred with a CFP® exam passed as a minimum requirement. Additional credentials such as Chartered Financial Analyst, Enrolled Agent, CPA are a plus. If not a CFP®, must have passed a Series 65 exam or its equivalent or should be eligible to do so
*Skilled user of Microsoft Office and financial planning software.
*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.

This position does not require new client generation although client retention and satisfaction are paramount.

- Yes, we have a company ski day!
- And a give-back day, flex-time, PTO, 401(k) with company contributions, health insurance, and other benefits.
- A career path and profit sharing plan 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@ConfluenceFAcom. 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 Ave Suite 210 Boulder, CO 80303.
www.ConfluenceFinancialAdvisors.com