CASTLEPOINT
WEALTH ADVISORS

# Advisor

Castlepoint Wealth Advisors is one of the leading wealth management firms in the Southwest and has become a career destination for talented professionals. Our unique work culture promotes teamwork, professional growth and an engaging environment.

Our core purpose is to build happier and more prosperous lives. We believe a healthy work/life balance is essential – happy team members provide the best possible service to our clients.

We are hiring an Advisor to join our talented team to help us continue to deliver great value to clients.

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## Duties and Responsibilities

The Advisor plays an integral part of a three-person client service team that advises clients on wealth and financial planning strategies. This person is an excellent communicator with a proven track record of success with clients. We are looking for someone who works well in a team and fast-paced environment who is committed to providing superior client service.

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## Advisor responsibilities include but are not limited to:

- Building deep relationships and communicating with clients on the implementation of their financial plans and revisions for events in their lives.
- Collaborating with investment team to manage client portfolios, and prepare investment policy statements.
- Developing customized wealth plans focused on cash flow, tax, investment strategy, retirement planning, estate planning, and risk management with your team.
- Serving as co-advisor when meeting with clients, prospects and other professionals.
- Coordinating and building relationships with clients’ other advisors such as accountants and attorneys.

## We will hire the person who best embodies and embraces the Castlepoint Core Values:

+ **Lifelong Learning**
  Maintain a beginner’s mind and develop the necessary skills and expertise to excel in our profession.
+ **Serve with Excellence**
  Honor others by exceeding expectations.
+ **Have Fun!**
  A fun and flexible workplace allows us to pursue happiness in our own lives.
+ **Seek Simplicity**
  Reduce complexity so we can focus on what matters most for clients.
+ **Team-Minded**
  When we move forward together, success takes care of itself.
+ **Lead with Integrity**
  Lead by example and always do the right thing.

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## Qualifications

We would strongly prefer these qualifications in this Advisor position:

- CFP, CFA, or CPA/PFS preferred
- Minimum of 3 years in a financial services field, ideally in a client-facing role
- Proven analytical and problem-solving skills

## What we offer:

- Competitive salary based on experience and skills.
- Performance-based bonus, team and individual.
- Paid time off.
- Health care, dental, and company retirement plan.
- Opportunities for professional growth and continuing education.

## How to Apply →

Interested applicants should send their resumes with a cover letter to **Drew@castlepointadvisors.com**. We will contact you if we believe your qualifications meet our needs. Thank you!

*Castlepoint Wealth Advisors is an Equal Opportunity Employer*

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