CASTLEPOINT
WEALTH ADVISORS

Senior Wealth 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 a Senior Wealth Advisor to join our talented team to help us continue to deliver great value to clients.

Duties and Responsibilities

We are looking for a proven leader who works well in a team and fast-paced environment, and also committed to providing superior client service. The Senior Wealth Advisor leads a three-person client service team that advises clients on wealth and financial planning strategies.

Senior Wealth Advisor responsibilities:

- Working directly with clients on the implementation of their financial plans and revisions for events in their lives.
- Collaborating with investment team to manage client portfolios, prepare investment policy statements, and provide research on investment products.
- Leading discussion of customized wealth plans focused on cash flow, tax, investment strategy, retirement planning, estate planning, executive compensation, and risk management with your team.
- Serving as a quarterback to client's advisory team and building close relationships and adding value to their outside advisors such as accountants, attorneys, and bankers.
- Handling prospective client meetings.
- Cultivating and retaining client relationships.

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 Senior Wealth Advisor position:

Required Qualification

- CFP, CPA, or CFA
- Bachelors Degree
- Minimum of 7 years in a client-facing role in the financial or accounting services field

Preferred Qualifications

- 10+ years experience in financial or accounting services field
- Experience in reviewing tax returns and tax planning
- Graduate degree - JD, MBA

How to Apply →

Interested applicants should send their resumes with a cover letter to **Kendall@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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