



Wealth Advisor

Description:

Hunter Associates seeks an experienced professional who will work closely with the Investment Advisors on client initiatives. The Wealth Advisor will be involved in the client service and engagement process requiring the ability to analyze financial information, recommend financial plans and monitor outcomes. The ability to manage multiple complex projects and responsibilities concurrently and effectively is also required. We seek a professional with a motivational, inspirational and enthusiastic approach to team facilitation.

Duties and Responsibilities:

- Provide comprehensive financial planning by gathering data, developing financial plans and scenarios
- Ensure compliance with required investment guidelines, policies, procedures and reporting requirements
- Support implementation of additional planning services to be offered by the firm
- Support aspects of the due diligence process in evaluating new portfolio investments

Qualifications:

Required:

- An excellent knowledge of financial planning and the ability to apply skills creatively to diverse client needs
- Financial planning and/or investment advisory experience working with high net worth clients
- Retirement income planning experience
- At least 4 years of relevant professional experience

Preferred:

- CFP® Certification
- JD

We offer:

Hunter Associates provides competitive compensation and an engaging environment centered on freedom with responsibility. Our culture arises from being a team of high-achieving individuals dedicated to helping our clients define and reach their financial objectives. Hunter Associates is an employee-owned independent wealth management firm. We offer a comprehensive benefit package including a 401(k) and medical, dental, vision, life and disability insurance.

About the Firm:

Hunter Associates' primary goal is to help our clients define and achieve their financial objectives. Our further goal is to provide our associates with growth opportunities, a rewarding experience and a pleasant environment. Our success, both financial and otherwise, will be a by-product of achieving these goals. Member of FINRA and SIPC. www.hunterassociates.com