Client Advisor

Lurie Wealth Advisors, LLC (LWA) is a wealth advisory firm committed to the delivery of exceptional guidance to a select group of individuals, wealthy families and business owners of closely held businesses. We offer independent and objective advice in the areas of investment management and financial planning. Situated within a top accounting firm in the Twin Cities, we provide a unique approach with integrated, tax aware advice.

LWA is seeking a dynamic, self-directed, adaptable, and detail oriented Client Advisor to join our entrepreneurial organization. You will work within a collaborative environment ensuring proactive advice and service to our industry diverse clientele. The Client Advisor will help formulate and implement investment and financial planning recommendations while also working on specific projects to advance our practice.

As a Client Advisor you will:

- Manage and develop client relationships, working with the support of a principal and/or senior advisor.
- Provide technical support to the principal in the delivery of advice to clients.
- Provide client service management and resolve routine client account issues independently.
- Prepare client reports and prospect presentations including comprehensive planning strategies and investment analysis.
- Provide financial planning input and analysis that includes data gathering, modeling, case design, plan development, and coordination with advisory team.
- Client acquisition and administration: Leverage and enhance business niche markets within a collaborative engagement model with Lurie, LLP. Ensure client onboarding experience is seamless and efficient.

Ideal Candidates will have:

- Bachelors degree with 5-7 years of professional experience in financial services are required.
- Series 7, 63,65
- Strong client focus and a proven ability to think in terms of the clients' perspective.
- Highly motivated and personable with outstanding verbal and written communication skills, excellent judgment and analytical abilities, keen attention to detail and solid organizational skills.
- Strong written, verbal and presentation skills, including the ability to simplify difficult financial concepts to educate a less experienced audience.
- Advanced understanding of investments and interpersonal skills that enables you to discuss investments and financial planning topics with clients in an authoritative yet warm and engaging manner that inspires confidence.
- Desirable: CFP, CFA, or tax or estate planning background.
- Team player, collaborative, able to work with and through others.
- Desire and ability to work successfully in a small and growth oriented company.

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