

First Five Hires + Key Functions

Senior Wealth Advisor/CEO

- Nurture top-tier relationships
- Solicit new top-tier clients
- Develop and oversee implementation of strategic vision

Director of Operations

- Deliver executional excellence by driving adoption of technology and workflows
- Lead investment activities
- Lead weekly team meetings and manage staff

Associate Wealth Advisor

- Serve mid- and lower-tier relationships
- Assist senior advisor in serving top-tier relationships
- Drive asset retention by building connections with adult children of top clients

Operations Associate

- Respond to client inquiries
- Process new accounts and transfers
- Process contributions and redemptions

Marketing Associate

- Plan, implement and follow up on events
- Manage the digital presence
- Deliver random acts of kindness for top clients

Front Office Associate

- Triage calls and greet visitors
- Schedule meetings
- Handle correspondence