Investment Advisor

We are seeking an entry level Investment Advisor for our fee-only wealth management firm in Las Cruces, NM. The ideal candidate is one who is ready to launch and grow a career in financial planning during anexciting time in the industry. Such an individual will desire working in a team-oriented independent RIA firm; will have involvement in all aspects of the business, learning and shaping the way we care for our clients; and will gain valuable experience for developing a financial planning career. Candidates that fit into our firm and culture will embrace technology, enjoy a collaborative environment, and hold in high regard serving clients in a fiduciary capacity. We value our clients, and our clients value our services. Our practice is well represented by individuals who have realized significant wealth at start-up or emerging growth companies.

Position Highlights

This individual will work with experienced financial planners, providing financial planning and investment advisory support. Key responsibilities include preparation of financial plans, portfolio administration, investment research and analysis, and coordination of client service needs with team members.

Specific Areas of Focus Include:

- Preparing financial analyses and financial plans for clients
- Aiding with analysis, rebalancing, and administration of client investment portfolios
- Conducting investment research, reporting, and analysis
- Providing support for processing client service needs
- Assisting with creation and implementation of workflows and procedures to improve efficiencyand enhance client experience.

Qualifications

- Experience in the field is desirable, although not required, as this is an entry-level financial planning position with career development. Candidates must be enrolled or have completed a financial planning educational program leading to certification (i.e., CFP® and/or CPA/PFS). Forcandidates without financial industry experience, other professional experience is preferred.
- B.A. or B.S. degree, preferably in Financial Planning, Finance, Accounting, or Economics
- Series 65 license
- Strong analytical skills
- Excellent written and verbal communication skills
- Self-starter, productive, works well with a team and independently.
- Ability to identify, meet, and follow through with client needs and requirements with keen attention to detail.
- Excellent project management skills with ability to prioritize and track multiple tasks.
- Proficiency in Microsoft Office Suite
- Knowledge of CRM (i.e., Junxure), eMoney Guide Pro, FINRA 65, and Black Diamond a plus

Perks

- Competitive compensation and benefits
- Reimbursement of approved professional development expenses
- Customized career development process
- 401(K) and company matching
- Health care benefits

Westwind Capital, LLC is an Equal Opportunity Employer

Las Cruces, NM (575) 556-8500 | Denver, CO (720) 339-0855
www.ww-capital.com