ASSOCIATE ADVISOR.

Fi3 Financial Advisors is a fee-only, independent Registered Investment Advisor (RIA) and multi-family office. With significant growth over the past 5 years, Fi3 is one of the fastest-growing wealth management firms in the country. Serving as a fiduciary, we act as the Family's Chief Financial Officer, providing comprehensive financial guidance and investment management services to high net worth families.

The Associate Financial Advisor is critical to Fi3's growing organization and will be mapped with a career path to Lead Advisor and/or Partner. This position will directly support our Lead Advisors, particularly as it relates to client onboarding, financial analysis and investment planning. As an Associate Financial Advisor, you will help develop, update and present financial plans to our clients as well as assist in the implementation of financial planning recommendations.

In partnership with the Lead Advisors, to be successful in this role it is essential that you:

- Take ownership of all aspects of scheduled client meetings, including preparation of investment allocation reports, personal financial statements, and other financial planning deliverables.
- Facilitate tax planning by gathering, summarizing, and collaborating with internal and external tax professionals.
- Prepare and make recommendations for client financial plans related to estate planning, retirement income needs, cash flow, investment management and personal insurance reviews.
- Review client financials throughout the year to reduce tax liabilities and manage credit.
- Adopt and leverage the technology platforms our firm has in place.
- Delegate non-advisory follow up work to Implementation Specialists and/or Administrative team.
- Play a critical role in the successful onboarding of new clients and retention of existing clients.
- Embrace a high-service, tailored client service philosophy along with the entire Fi3 Team.
- Desire future advancement to Lead Advisor position to support the consistent growth of the firm.
- Sincerely enjoy being helpful and of service to clients, and eager to develop long-term relationships with colleagues, clients and the community.

The first 3-5 years of an Associate Financial Advisor's career is spent learning and crafting an expertise in financial planning and family office work. There are no cold calls, quotas, or other sales requirements for this position.

Qualifications:

- Top 10% in capabilities, top 1% in effort.
- Above average sense of urgency.
- Minimum of 3 years of experience in financial services, banking or accounting industry.
- Bachelor's Degree, ideally in business, accounting, finance, mathematics and/or economics; Advanced Degree (JD or MBA) a plus.
- Ability to pass the comprehensive CFP® exam within first 2 years of employment is required.
- Life-long learner and constantly striving to growing their knowledge/expertise.
- Strong acumen and affinity for numbers, financial analysis and attention to detail.
- Exceptionally organized/efficient, can handle stress, manage priorities, effectively communicate, and excel in an entrepreneurial environment with strong team structure.
- Commitment to a career in financial planning.
- Passion for educating and coaching families on financial matters, and not focused on selling industry products.