Nvest Wealth Strategies®
Nvest Wealth Strategies® is an *independent*, fee-only, registered investment advisory (RIA) firm serving individuals, small business owners, and charitable organizations. With a team-oriented culture, we are seeking an exceptional, client-oriented and detail-focused professional to work directly with clients and the financial advisory team to develop and pursue strategies to help our clients achieve financial peace of mind.

Position: Client Advisor
Benefits: Competitive salary & bonus, 401k with company match, paid time-off, medical & tuition reimbursement programs, flexible work schedule

Role Summary
- The Client Advisor will support the Lead Advisor to "deliver financial peace of mind" to all Nvest clients through prompt & regular communication, fundamentally sound data analysis, & superior customer service.
- The Client Advisor will have direct and regular interaction with our CIO to support portfolio rebalancing, develop investment strategies, raise cash, etc.
- A successful candidate will:
  - Embrace our core values during all interactions, both internal and client facing:
  - NVEST = Nest (protect), Value, Excellence, Stewardship, and Team
  - Be a present and active member of Team Nvest
  - Demonstrate the necessary skills to deal with multiple clients, prospects, and priorities

LIVING LIFE Financial Planning
- Help our clients articulate goals/dreams and develop specific plans to achieve
- Planning projects such as net worth, cash flow evaluation, retirement projections, mortgage refinancing, Social Security or pension optimization, Roth conversions, college education, insurance, and estate planning
- Develop and communicate long-term projections for investable assets, cash flow, and legacy (estate)
- Coordinate activities as necessary with outside advisors (attorneys, accountants, insurance agents, etc.)

Investment Strategies & Client Portfolio Management
- Articulate investment strategies to clients and actively contribute to ongoing investment dialogue
- Review outside accounts as requested and provide recommendations aligned with known investment objectives
- Actively participate in monthly investment committee meetings and collaboration

Business Development
- Take appropriate and responsible actions to build new business opportunities at Nvest Wealth Strategies®
- Foster both referral and new business opportunities
- Leverage client referrals, personal network, and key influencers effectively

Team
- Effectively utilize our internal CRM system to foster team communication
- Support the Office Manager and learn basic tasks critical to team efficiency (Schwab, PC, CRM, reports, etc.)

Skills & Qualifications
- Work experience that demonstrates knowledge of financial industry and planning concepts
- Excellent communication, listening, and relationship building skills
- Strong project management skills – organized, detail-oriented, and able to multitask and prioritize
- Bachelor's Degree, CFP® designation
- Proficient with various Financial Planning Software, Office Suite, CRM, Portfolio Management, etc.

Contact
Send resume and cover letter to:
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