

ASSOCIATE ADVISOR (DENVER)– ADVISOR TRACK PROFESSIONAL

Ideal Candidate – Who You Are:

- Do you enjoy helping people? Partnering with colleagues on a team while also working independently?
- Do you enjoy helping people answer questions such as, “How much money do I need to retire and travel the world?” or “How can I ensure my family’s future?”
- Do you want to work in a firm that truly values financial planning expertise, puts clients first, and doesn’t pressure you to sell products or source clients?

BSW Wealth Partners – Who We Are:

BSW is a multi-family office and wealth advisory firm managing ~\$1 billion for amazing clients in Colorado and throughout the US. Our purpose is to Make Life Better for BSW clients, staff, and their families by building a firm that helps them achieve their life goals. BSW has been named a Best Place to Work by Outside Magazine and Investment News; one of the top 300 Financial Advisers by the Financial Times; and is a Certified B Corporation.

Position Description – Your Dream Job:

BSW Associate Advisors provide analytical, qualitative, financial planning, and client relationship support to BSW’s Advisors. BSW Associate Advisors work side-by-side with BSW Advisors, who provide mentorship and guidance along the two to five-year path to becoming a full BSW Advisor. Mentorship, client-facing responsibility and experience, and professional education support are the key components of BSW Associate Advisor development. This position will work out of BSW’s Denver office.

Your Responsibilities – Stuff We’ll Trust You With:

1. Quantitative, Qualitative, Financial Planning, & Client Relationship support:
 - Creation and maintenance of Financial Plans, Investment Proposals, and Investment Policy Statements (IPS) reflecting client financial goals and objectives; assets and liabilities; cash flow needs; and tax considerations.
 - Utilizing financial planning software tools, such as eMoney, Money Guide Pro, or building/using Excel models.
 - Research and recommendations on: client liquidity events, business sales/exits, private assets, retirement, etc.
 - Coordinate with client’s tax and legal advisors to support implementation of strategic planning.
 - Client insurance evaluation including coverage, needs, options, and recommendations.
 - Managing and facilitating BSW Advisory team projects.
2. Helping BSW achieve its Purpose, firm goals, and vision.
3. Contributing to a highly effective organization that produces exceptional client service and amazing results by fostering mutual trust; open, honest, and candid communication; effective teamwork; and an unrestrained sense of enthusiasm, commitment, and FUN.

Your Qualifications – Stuff You’ll Tell People at Parties:

- Required:
 - Passion for client service, financial planning, and the drive, motivation, and grit to become an Advisor.
 - Certified Financial Planner (CFP) certification or willingness to pursue the CFP.
 - Undergraduate or advanced degree.
 - Attention to detail, self-motivated, well organized.
 - Outstanding integrity and discretion.
 - Strong interpersonal communication skills.
- Preferred, but not required:
 - Experience with eMoney, Money Guide Pro, or other financial planning software.
 - Strong command of Microsoft Office suite, especially Excel.
 - Financial planning experience with a Registered Investment Advisor (RIA) or in a financial advisory setting.
 - Investment experience and/or knowledge.

Perks – More Stuff You’ll Tell People at Parties:



B-Corp Status, Diversity & Inclusivity – Another Reason You’ll Be Proud to Work at BSW:

BSW Wealth Partners is proud to be a Certified B Corporation. Certified B Corporations are for-profit companies seeking a better way to do business by meeting the highest standards of third party verified social and environmental performance, accountability, and transparency. B Corp certification is part of a global movement that serves to redefine success in business so that companies aspire not only to be the best in the world, but best for the world. BSW’s certification highlights our commitment to diversity, equity, inclusion and pay equity by gender. **We strive to build and foster a community of respect, love, and mutual support where all races, genders, social classes, and sexual orientations will always be welcome.**

We encourage applications from all qualified candidates, particularly:

- Traditionally under-represented populations within financial services.
- Parents returning to the workforce after extended career breaks.
- People with physical disabilities or limitations.
- Transitioning military service members and veterans.

Application Process:

Submit your resume and a cover letter to sophia@bsw.com. In your cover letter, *please address the following:*

- *In your own words (20 or less), describe what you think BSW does.*
- *What are the top three reasons you are the best candidate for this position and for BSW?*
- *Why are you interested in our firm and this industry? What aspects? Do you have any applicable professional experience?*

