



## **ASSOCIATE ADVISOR (BOULDER)– 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 problem solving to answer questions such as, “How much money do I need to retire and travel the world?” “How can I ensure my family’s future?” “How can I better align my investment strategy with my values?”
- 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 \$1.25 billion for a national and international clientele from offices in Boulder and Denver. Our purpose is to Make Life Better. BSW has been named a Best Place to Work by Outside Magazine, Investment News, and the Denver Business Journal; one of the top 300 Financial Advisers by the Financial Times; is Gender Equity Now certified; a Certified B Corporation; and a Public Benefit Corporation (PBC).

### **Position Description – Your Dream Job:**

BSW Associate Advisors provide analytical, qualitative, financial planning, and client relationship support to BSW’s Senior Advisors. BSW Associate Advisors work side-by-side with BSW Senior Advisors, Portfolio Managers and Client Service Managers to provide a world class client experience. BSW provides mentorship, opportunity for client-facing responsibility and experience, and professional education support as you grow in your career. This position will work out of BSW’s Boulder 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.
  - Coordinating with client’s tax and legal advisors to support implementation of strategic planning.
  - Project management including tracking client projects and tasks in CRM.
  - 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 a world class BSW 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.
- Strongly 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 – Why We’re A Perennial Best Place To Work:**

- Winter & Summer Fun Days
- Profit Sharing, 401(k) Plan + Matching
- Health Savings Account + BSW-funded Healthcare
- Paid Maternity & Paternity Leave
- BSW pays for obtaining and maintaining professional certifications
- PTO Days for Volunteering
- Healthy Lifestyle & Custom Workspace

**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 [nmurphey@bsw.com](mailto:nmurphey@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?*

