FULCRUM
CAPITAL

Associate Advisor

Are you an experienced financial planner ready to take the next step in your career? We're seeking a detail-oriented, service-focused Associate Advisor to join our dynamic team. You'll play a critical role in working directly with clients, creating customized financial strategies, and growing your expertise alongside an amazing, diverse team. You will be an integral, key contributor, working closely with seasoned advisors to deliver consistent wealth management services to our clients.

What You'll Do:

Client Relationships: Serve as a key point of contact for clients, ensuring seamless wealth management services and proactive communication.

Team Collaboration: Coordinate communication and teamwork among client service associates, portfolio managers, and wealth management team.

Financial Planning: Help create and maintain financial plans in eMoney, update reports, and identify key opportunities for your clients

Client Service: Be the quarterback and assist with portfolio monitoring, and coordinate with clients' CPAs, attorneys, and other professionals.

Professional Growth & Industry Engagement: Stay ahead of wealth management trends, build your professional network, and represent our firm at industry events.

Embrace Flexibility: Adapt to changing priorities and responsibilities with ease, demonstrating flexibility and a willingness to pitch in wherever needed.

Take Ownership: Take ownership of ad hoc administrative projects, demonstrating initiative, resourcefulness, and a proactive approach to problem-solving.

Champion Our Values: Embrace and uphold the core values of independence, excellence, integrity, and community in all aspects of your work.

What You'll Bring:

Alignment with Our Values: A commitment to upholding our core values of independence, excellence, integrity, and community in all aspects of your work.

A Positive Attitude: You're the type of person who brings energy and enthusiasm to everything you do.

Credentials: Certified Financial Planner™ (CFP®) designation required. A finance-related degree is preferred.

Organization Skills: Exceptional organizational skills with the ability to multitask, prioritize tasks, and manage time effectively, always ready to take the initiative.

Communication: You're an excellent communicator, both written and verbal, and confident working with clients and team members.

Team Spirit: You're a natural collaborator who loves working with others to achieve common goals, and self-motivated to improve and grow.

Client Focus: A client-first mindset with a genuine desire to provide exceptional service and enhance the client experience.

Flexibility: An adaptable nature with the ability to thrive in a fast-paced, dynamic environment and embrace change with enthusiasm.

Ownership Mentality: A proactive attitude with a strong sense of ownership and accountability for your work and its impact on the firm's success.

Why You'll Love Working With Us:

Culture of Excellence: Join a team that's committed to excellence in everything we do, from client service to professional development.

Collaborative Environment: Work in a supportive and collaborative environment where your contributions are valued, recognized, and rewarded.

Opportunities for Growth: Take advantage of opportunities for professional growth and advancement as you develop your skills and expertise.

Meaningful Impact: Be part of something bigger than yourself, making a meaningful difference in the lives of our clients and helping them achieve their financial goals.

What We Offer:

Salary: $95,000 - $135,000, dependent on experience and education

Benefits: Include healthcare plan, 401(k), long-term disability, bus pass, and gym membership

A**nnual Bonus:** Merit-based bonus for achieving specific goals

Professional Development: Support of your pursuit of relevant career development opportunities

Who We are:

Founded in 2007, Fulcrum Capital is an independent Registered Investment Advisor headquartered in Seattle. Our clients are individuals, families, foundations, and companies who seek a more thoughtful approach to investing. Our clients choose Fulcrum because they want to know what they own and be confident that their holdings align with their values. Our clients and team members value our independence, transparency and thought leadership, particularly in the realm of sustainable investing. We value diversity and support work-life balance. Our firm is majority women-owned and all of Fulcrum's owners work at the firm; we are 100% independent.

For more information contact:

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