PERSPECTIVE
Wealth Partners

Role: ***Financial Advisor***

Location: Boise, ID (preferred)

### ***About Perspective Wealth Partners***

Perspective Wealth Partners (PWP) is a fee-only, SEC-registered RIA, with offices in Boise, Idaho and Austin, Texas. The firm was founded in 2006, and serves about 200 households, managing ~$450MM in assets for our clients.

We are seeking an early/mid-career professional who desires to be an integral part of a small team. The firm currently has five employees, three of whom are partners. The preferred role location is Boise, Idaho, with an option for Austin, Texas.

PWP offers clients a wealth management experience that allows them to relax and be confident in achieving their intentions. As a fiduciary to our clients, PWP is legally obligated to provide investment portfolio management and financial planning in client's best interest without selling any products or receiving commissions.

In tandem with a first-rate wealth management experience, we are also purposeful about helping our clients live meaningful lives – thereby being a trusted thought-partner in non-financial areas.

We take immense pride in the value we create for our clients, and the delightful experience we deliver to them. Since we began to measure it, our client Net Promoter Score (NPS) has averaged 94.

We are deeply intentional about our welcoming firm culture. Our core values encompass caring, dedication, passion, curiosity, proactivity, purposefulness, integrity, candor, and work/life/community balance.

PWP offers competitive compensation including salary and bonus, 401(k), health insurance, and paid time off (PTO). For the successful candidate, we would offer a relocation allowance to offset moving expense.

PWP is an Equal Opportunity Employer. We support diversity in the workplace and embrace diversity in the clients we serve.

***Position Description***

As an associate advisor, you work alongside senior advisors to deliver immense value to clients – from understanding each client's unique needs, creating financial plans, awareness of relevant tax issues, developing investment policy statements, designing portfolios, and implementing and maintaining the plan and portfolio throughout time.

For all advisors, a good part of our service to clients involves tax planning given the overlap with portfolio management that optimizes "net return" for clients. Our client base requires a holistic approach to effective planning, and this position will necessitate an ability to be dynamic as client needs, tax environments, and markets evolve.

We prefer that PWP advisors become partners in the firm. Typically, this process will take about five years. If you aspire to be an owner, the position will be a good fit for you. Conversely, if you do not desire to be a firm owner, this position is not a good fit for you, but we would be happy to explore other roles in the firm.

***Core Responsibilities***

- Current Client Relationships
  - Address current client needs, uncover ways to deliver greater value to clients and new ways to deliver a delightful experience.
  - Be versed in developing financial plans and be comfortable assisting in financial planning discussions with clients.
  - Be versed in portfolio performance and attribution, and assist in communicating how performance integrates with financial plans.
  - Possess the analytical capacity to determine and suggest solutions in advanced areas such as retirement planning, investment strategies, employer stock and option planning, deferred compensation planning, pension analysis, estate planning, insurance review and analysis, tax loss harvesting, etc.
- New Client Development
  - Associate advisors are not responsible for business development efforts, but they are welcome and compensated to do so. As you progress toward becoming a senior advisor, and then a partner, PWP will support and coach you on designing a process to leverage your network and communities.

- Team Member and Partner
  - Work with other team members to evaluate/lead new firm-wide strategic initiatives.
  - Promote a culture of compliance within the advisory team by following and enforcing firm policies and procedures and all applicable compliance rules and regulations.
  - Actively participate in industry/community organizations.
  - Be well versed in written and verbal communication, sharing the responsibility for the firm's public presence – including written content, webinars, in-person presentations, etc…

***Interpersonal Qualifications***

- Relationship driven and a passion for service.
- Positive energy and professional, upbeat attitude.
- Strong alignment with PWP's firm's vision and values.
- Ability to communicate complex financial topics in a simple, and understandable manner.
- Process-oriented working style, focused on organization, accuracy, and attention to detail.
- Embraces personal development and feedback, not just coachable but has a desire for coaching.
- Ability to work and multi-task in a fast-paced, evolving environment – can pivot quickly.
- Comfortable with a broad set of responsibilities.

***Education/Experience/Technical Qualifications***

- Bachelor's degree (advanced degrees welcome but not required).
- CFP, or working toward CFP.
- 0-6 years of financial planning, investment management, wealth management, or tax experience with direct client interaction.
- Series 65 securities registration required (or completed within 6 months of hire).
- Highly analytical and proficient in Microsoft Excel.
- Knowledge and experience with financial planning software and systems is preferred. TD Ameritrade, Charles Schwab, Money Guide Pro, Right Capital, Orion, Redtail, or others.
- Track record of establishing and maintaining successful interpersonal relationships.

***Compensation***

We benchmark compensation to market and then and strive to pay above market given our small firm size and broad responsibilities.

- Total Compensation Range: $65K-100K + Benefits.

***Application Process***

If interested, please email a resume and a brief description of your interest to position@perspectivewealth.com, and use “Financial Advisor” in the subject line.

We look forward to responding within five business days of your application being received.