PERSPECTIVE
Wealth Partners

About Perspective Wealth Partners

Perspective Wealth Partners (PWP), founded in 2006, is a fee-only SEC-registered RIA, located in Boise, Idaho, that serves approximately 250 households with $700MM in assets.

PWP offers clients a wealth management experience focused on achieving their financial goals and living meaningful lives.

In tandem with providing a first-rate wealth management experience, we are trusted thought-partners in non-financial areas to our clients.

As a fiduciary, PWP is legally obligated to provide investment portfolio management and financial planning that is in the client's best interest. We are obsessive about optimizing after-tax returns for our clients. With CPAs on staff, our clients rely on us for in-depth tax planning and analysis.

We are deeply intentional about our internal culture and core values, which are comprised of: being service-oriented, committed to excellence, heartfelt, relatable, and genuine.

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

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

Role Summary

PWP is seeking an Associate Financial Advisor.

You will have the primary role of providing deep client relationship management and technical support to seasoned members of the Advisory Team, supporting the day-to-day relationships, and participating in/or conducting client meetings.

Core Responsibilities

- Collaborate with the firm's other Advisors to deliver on all aspects of personalized wealth management to our client base, including retirement planning, tax-efficient distribution planning, and investment strategies, social security claiming strategies, employer stock and option planning, deferred compensation planning, pension analysis, estate planning, insurance review and analysis, tax loss harvesting, etc.
- Support Lead Advisor to proactively uncover ways to deliver significant value to clients and new ways to provide a delightful experience
- Work with other team members to evaluate/help drive 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 your community.

Qualifications

- Bachelor’s degree.
- Relationship-driven and a passion for wealth management.
- Excellent communication, interpersonal, and relationship-building skills.
- High level of organization, accuracy, and attention to detail.
- Ability to multi-task in a fast-paced, evolving environment – can pivot quickly.
- Comfortable with a broad set of responsibilities.

Compensation

- We benchmark our compensation to the industry and intentionally strive to pay above market given our small firm size and broad responsibilities.
- PWP’s total compensation for this position ranges from $75K to $100K, depending on experience and expertise.

Application Process

- If interested, please email a resume and cover letter to position@perspectivewealth.com and use “Associate Financial Advisor” in the subject line.
- In the cover letter, please describe why this position is of interest to you and how you’d be a great fit to our team and culture.
- Given the critical nature of who we are in the lives of our clients and the intention we use in crafting the culture of our firm, our hiring process will be rigorous, involving multiple interviews and considerable written communication. If you’re up for this rigor, we look forward to hearing from you.