Associate Advisor Job Description:

What we offer:

Rather & Kittrell is a $1.2B AUM wealth management and retirement plan advisory firm located in Knoxville, TN. We are seeking an Associate Advisor to join our team. This position is a support role focused on assisting lead advisors in planning and delivering proactive recommendations to current and future clients.

The Associate Advisor will be responsible for creating and maintaining financial plans, taking an active role in client meetings, and implementing our wealth management process.

Position Summary: This is a challenging position that requires you to work closely with our advisors and operations team members to provide day to day financial planning support to clients and prospects. The Associate Advisor will work in our office in Knoxville, TN.

What you will get to do:

- Comprehensive financial planning including income tax mitigation, cash flow planning, estate distribution and trust planning, insurance analysis, charitable planning, and investment management
- Work alongside lead advisors in client meetings to deliver advice and build relationships
- Operate financial planning and performance reporting software; Moneyguide Pro & Black Diamond
- Create and maintain financial plans while assisting in presented analysis
- Initiate applicable workflows in CRM software
- Implement action items resulting from meetings
- Work closely with Client Service Manager for review of client account paperwork and custodian related service activities
- Contribute content to our newsletter and client communications

What you will learn:

- How we approach financial planning and investment management in order to provide fiduciary service to our clients
- How to assess a client situation, develop preliminary recommendations, and deliver them to high net worth clientele
- How to effectively use leading industry tools to produce financial analysis & reports
- How to ask clients the right questions at the right time and listen when appropriate

What we seek in a candidate:

- Bachelor’s degree from an accredited institution, preferably in Financial Planning

- 1-3 years of financial industry experience CFP®, CPA, EA or other relevant designations preferred
- Proficiency in financial planning software (Moneyguide Pro preferred)
- Above-average oral and written communication skills
- Above- average organizational skills and the ability to perform multiple functions simultaneously and prioritize those functions to meet the clients' needs
- Someone who is detail oriented but understands that you will have to make assumptions at times in order to move on and meet deadlines
- Demonstrate problem solving skills

Position perks:

- Competitive salary with bonus structure based on experience
- 401(k) plan with 3% employer contribution and discretionary profit sharing
- Company paid health, life, and disability insurance for Associate Advisor
- Paid vacation, sick time, and holidays
- Defined career path with opportunity to grow

The role is a 2-3 year position and an entry point to our advisory career path. Associate Advisors will either have or earn the CFP® marks and gain technical knowledge as the progress in the career path.