Associate Financial Advisor

Brown | Miller Wealth Management
8280 Greensboro Dr., Suite 220 | McLean, VA 22102

POSITION OVERVIEW

Brown | Miller Wealth Management, an independent Registered Investment Advisory firm based in the Washington DC area, is seeking a dedicated Associate Financial Advisor to join their growing boutique wealth management team. The Associate FA will focus on providing exceptional client service, while also providing hands on support to the Financial Advisors of the firm.

Throughout the tenure of employment, the Associate FA must be willing to learn and strive to continuously improve personally and professionally. You must display sincere interest, respect, and desire to identify clients' needs and help improve their financial lives. As a team player and part of a growing firm, the Associate FA must show respect, a willingness to work on a team through collaboration. Finally, they *must* uphold compliance, ethics, and the firm's integrity at all times.

We invite you to connect with us at Brown Miller WM if this position aligns with your experience and personal career objectives. We look forward to discussing the many advantages that joining our expanding team has to offer!

Client service responsibilities of Associate FA include but are not limited to:

- Consistently delivers superior and proactive client service. Actively responds to incoming emails, phone calls, and requests from clients. Creates and follows own action plans/tasks based on client needs and requests.
- Focuses on complex and multi-step client account updates and asset movements, including new household relationships, trust management, account transfers, and deceased processing
- Prepares, sends, and processes account documents
- Enters securities trades and processes order corrections
- Assists with active communication with clients and reaches out to correct any items needed. Keeps client aware of any longer-term project status
- Special projects as needed

Financial Adviser support responsibilities of Associate FA include but are not limited to::

- Act as primary back-up to Financial Advisors; assist with trading and strategizing to best accomplish various objectives; serve as direct support to Financial Advisors and Partners by providing advice and ongoing analysis
- Create financial plans and complete wealth management analysis
- Correctly document all client and prospective client conversations and business actions into the dashboard system; create and maintain client files; prepare and send follow-up client letters
- Maintain up-to-date client data in the contact management system and contact database for purposes of reporting, scheduling, fee tracking and marketing purposes
- Monitor financial strategies and investments and complete appropriate implementation in a timely manner
- Assists with updates, maintenance, and tracking of proprietary asset allocation models and strategies
- Oversee and provide support to pre-client-meeting preparation and post-client-meeting processing work
- Attend client meetings; take, assemble and transcribe notes relative to action items, tasks and decisions made during appointments; monitor and follow up with all pending action items
- Mentor with Partner's to gain marketing knowledge and hands-on experience for personal and professional growth

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BROWN | WEALTH
MILLER | MANAGEMENT
Discover. Design. Deliver.

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Required Qualifications:

- Series 65 required
- Bachelor's degree in finance or another related field
- 2+ Years in support or client relations position; Financial Services industry experience and/or sales experience is preferred
- A passion for financial planning & growing. We are seeking highly motivated candidates with a strong desire to deliver successfully, learn new skills, assume additional responsibilities, and advance their career

Benefit offerings:

- Competitive base salary with performance bonus potential
- 401k: 4% match with additional discretionary profit sharing
- Comprehensive medical and dental insurance
- Long-term disability insurance
- Work from home/telework is offered as needed, on a case-by-case basis
- Paid Time Off and Paid Holidays following the NYSE observed holidays schedule

More About Brown | Miller Wealth Management

The Brown | Miller Wealth Management team has been providing financial advisory services to clients for over 25 years. We specialize in working with high net-worth individuals, businesses, endowments, and foundations to help them simplify their complex financial needs. Our highly regarded wealth management team built their clientele during their time working for A.G. Edwards and Sons, Wachovia Securities, and Wells Fargo Advisors before launching their independently owned practice, Brown | Miller Wealth Management, LLC.

At Brown | Miller Wealth Management, our mission is to be an industry-leading wealth management firm providing clients with exceptional advice and service. Our team works collaboratively to deliver excellence in every aspect of the client experience. We strive to be recognized as a client-centric practice providing objective and independent advice, service, and solutions always in the best interest of our clients.