Pitzl Financial

PITZL FINANCIAL

YOUR PERSONAL BOARDROOM™

Associate Wealth Advisor

Job Title	Date
Associate Wealth Advisor	July 2021

Department/Business Unit	Supervisor
Financial Planning / Investment Management	Joe Pitzl, CFP®

About Pitzl Financial

We are a comprehensive, fee-only financial planning firm that presently serves around 250 households and manages roughly $260 million in investment assets.

We believe that the fundamental purpose of financial planning is to help people design a better life. We believe that money is best used in a manner that supports one's life, rather than being the driving force in the decision-making process.

We pair objective financial planning with time-tested, disciplined investing to help clients manage, grow and protect their assets through all of life's transitions. Our approach to the planning process has earned us recognition as one of the top firms in the Twin Cities.

Purpose of Job

The Associate Wealth Advisor will work directly with the firm's Principals in developing tools, processes and recommendations that aid our clients' pursuit of financial success.

The primary function of the associate planner is to assume day-to-day analysis and organization of our clients' financial affairs. This includes, but is not limited to, database management and organization, preparation for and follow-up after client meetings, interaction with our allied professionals (attorneys, CPA's, insurance agents) to provide and gather information, and to ensure timely and accurate follow-through on client "to-do's." This position does not have business development requirements.

Responsibilities

- Aid in the development of systems, processes and procedures to ensure consistency of service across all client relationships
- Assist with preparation for client meetings
- Work with clients and allied professionals to obtain needed information and/or to implement recommendations
- Assist with trading and investment reallocations
- Attend client meetings in support of Principals
- Gather and organize client information in our CRM system and client Playbooks

Job Qualifications

- Undergraduate degree, CFP® program preferred
- 0-3 years of financial planning / wealth advisory experience
- Familiarity with financial planning applications (Junxure, Orion, Money Guide Elite, Wealth Access) preferred
- Ability to manage time effectively with multiple projects and deadlines
- Ability to work independently and adapt / innovate without explicit instructions
- A commitment to confidentiality and a fiduciary duty of care

Please send resumes and cover letters to justin@pitzlfinancial.com