



Associate Wealth Manager

Accredited Investors Wealth Management® is currently seeking a talented Associate Wealth Manager to support the Wealth Management teams within an industry-leading wealth management firm. The Associate Wealth Manager role allows an individual to grow into a key person on the client service team, leading and navigating the processes required to meet client goals and objectives. The Associate Wealth Manager works directly with Lead Wealth Managers and other internal and external individuals to ensure that clients receive exceptional service. The ideal candidate will have strong attention to detail and be proactive in solving problems. Individuals must be team players as well as demonstrate a high level of competency in the areas of organization, adaptability, transparency, client focus and effective use of technology. The Associate Wealth Manager role is an opportunity to learn the fundamentals of Accredited Investors' model of wealth management within the supportive and mentoring environment of a team.

A successful candidate will be passionate about improving the lives of all those they will serve through accurate data collection, effective and efficient task management, thorough implementation and exceptional client service.

Primary Responsibilities

- Diligently maintain accurate and up-to-date client records within the firm's CRM and other data management tools
- Work collaboratively with the client's entire wealth management team (Relationship Manager, Lead Wealth Manager, Wealth Manager, Investment Manager)
- Respond to client inquiries and provide readily-available information to clients upon request
- Coordinate the implementation of various financial planning aspects including opening new accounts, updating client information, asset transfers, beneficiary changes, charitable gifting requests, insurance changes, implementing new insurance, debt refinancing, etc.
- Maintain and prepare common client reports and accurately complete standard client analyses, including balance sheets, insurance summaries, debt summaries, cash flow statements, cash flow analysis, etc.
- Communicate directly with clients and external client advisors to request and compile needed information
- Prioritize and track outstanding tasks for the client planning team
- Coordinate the use of internal and external resources to accurately and efficiently complete tasks by specified deadlines
- Review and send summary letters to clients

Required Knowledge, Skills and Abilities

- Self-disciplined with commitment to quality, attention to detail and accuracy
- Ability to effectively balance a client-centric style while working within the Accredited model of wealth management

- Ability to work successfully within the Accredited Investors culture while driving results – high personal and professional integrity
- Ability to anticipate client and team needs and plan appropriately
- Natural curiosity and desire for continuous learning
- High sense of pride and ownership of work product
- Highly adaptable
- Strong oral and written communication skills within a complex matrix-structured organization and ability to work effectively within a client team as well as independently
- Excellent organizational and time management skills; proven drive to consistently follow-through
- Personable and approachable with a positive attitude and professional demeanor
- Ability to effectively engage Accredited's clients, outside advisors, and fellow team members
- Ability to receive and provide feedback in an effective way
- Flexibility in work schedule during high-volume periods or when critical deadlines exist

Education and Experience

- 3+ years of industry experience and/or a degree in a financial planning related field
- Strong proficiency with Microsoft Office, including Excel, Word and PowerPoint

Experience Accredited

Accredited Investors Wealth Management®, based in Edina, Minnesota, is a fee-only comprehensive Wealth Management firm. We serve high net worth clients using an individualized service model. Our clients value our strong level of attention to detail, responsiveness to their needs and professional style.

As a firm, in addition to serving our clients, we are engaged in community outreach and various green initiatives. Our employees enjoy a beautifully appointed facility, including a fitness center, state-of-the-art technology, and amenities that enhance our work environment. Development and training of our firm's talent is a top priority.

Accredited Investors Wealth Management® offers a competitive compensation and benefits package including medical; dental; disability coverage; a 401k plan with a generous employer match; life insurance; a marketplace-leading time-off allowance, including paid parental leave and paid volunteer time; and firm-wide profit sharing. Accredited was named one of the Top 150 Workplaces in Minnesota by the Star Tribune in 2020.

Accredited is committed to promoting diversity and inclusion in our hiring process and is proud to be an equal opportunity employer. We welcome qualified applicants without regard to race, color, religion, sex (including pregnancy, sexual orientation and gender identity or expression), national origin, genetics, disability, age, veteran status, and any other characteristic protected by federal, state or local laws.

For more information about our firm, please visit our website at Accredited.com.

Please direct your cover letter and resume to: resumes@accredited.com.