Accredited Investors
WEALTH MANAGEMENT®

SPEND YOUR LIFE WISELY™

Associate Wealth Manager

Accredited Investors Wealth Management® is currently seeking a talented Associate Wealth Manager to contribute to the wealth management team within an industry-leading wealth management firm. The Associate Wealth Manager role allows an individual to grow into a key person on the wealth management team, leading and navigating the processes required to meet client goals and objectives. 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.

Who We Are

We are a high-performing group of nearly 60 team members who are passionate about delivering exceptional service for our clients and being a sought-after place to work. Founded in 1987, Accredited delivers industry leading wealth management services to approximately 600 families, providing an invaluable service by pairing the breadth and depth of our collective financial planning expertise with a thorough knowledge of our clients' lives. Fiercely independent and 100% owned by a group of actively engaged employee shareholders, Accredited manages approximately $3 billion of investment assets as of 12/31/2022.

We demonstrate our commitments – to our clients, our colleagues, and our community – through our values, culture, and mindset:

> ***Values-Based*:** Our values are embedded within our work through our deep relationships with our clients, connection and camaraderie with colleagues, philanthropic contributions, and sustainability efforts within our community.
> ***Culture-Focused***: The Cultural Constitution from which we operate at Accredited is not meant to be aspirational; it is practiced in our daily work. By actively applying gratitude and compassion, and functioning as one team, we strive to influence the future of our firm through our core values.
> ***Curiosity-Minded*:** We are building a diverse team of individuals who are comfortable asking questions, not simply answering them.

What It is Like to Work Here

Purposeful - At Accredited Investors Wealth Management, our guiding principles are centered on improving the individual and collective lives of all those we serve – clients, colleagues, and the community.

Challenging – Our work is frequently challenging and fast-paced, yet we believe challenges bring out the best in others and ourselves. It is one of the many reasons why Accredited's workplace culture has been recognized by media outlets within our community and our industry.

Energizing – Surrounded by thoughtful, charismatic leaders, laughter echoes through our hallways and egos are checked at the door. While collaboration is engrained, camaraderie is organic. New learnings are fostered and shared. Fun is encouraged on most days ending in y.

Who You Will Work With

You will be a member of the wealth management team and work directly with Lead Wealth Managers and in partnership with other internal and external individuals to ensure that clients receive exceptional service, and standards of care are met.

What Responsibilities You Will Have

- 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 (Client Director, Lead Wealth Manager, Wealth Manager, Investment Manager, Client Service Associates)
- 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 agendas and summary letters to clients

Who Will Be Successful

A successful candidate will be enthusiastic 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.

A team player that demonstrates a high level of competency in the areas of organization, adaptability, transparency, client focus, and effective use of technology.

What You Offer

- Self-discipline 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
- Skilled in anticipating client and team needs
- Natural curiosity and desire for continuous learning
- High sense of pride and ownership of work product

- Adaptability
- Sound 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
- Effective engagement with 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
- Minimum of 2 years of full-time professional experience
- Strong proficiency with Microsoft Office, including Excel, Word, and PowerPoint

What We Offer

Accredited Investors Wealth Management® offers a competitive compensation and benefits package including medical; dental; vision; disability and life insurance. We offer a 401k plan with generous employer contributions and match. In addition to our core benefits package, Accredited also offers enhanced benefits including pet insurance; adoption and fertility assistance; financial support for professional development and certifications; personal financial and investment planning services; charitable match; a marketplace-leading time-off allowance, including paid parental and grandparental leave and paid volunteer time; and firm-wide profit sharing. Our employees enjoy a sustainably focused, beautifully appointed facility, including a fitness center, pickleball courts, outdoor patio, state-of-the-art technology, electric vehicle charging stations, and amenities that enhance our work environment.

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.

Salary Range: $62,000 to $82,000

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

Please direct your cover letter and resume to: resumes@accredited.com. Upon receipt, we may ask you to submit your application via our LinkedIn job posting. No recruiters, please.