



Title: Wealth Management Client Advisor - Seattle, WA

Company Description - ASI Wealth Management & Consulting Services (ASI)

ASI is a successful investment advisory firm with over \$1 billion in assets under advisement. ASI has served Pacific Northwest investors for nearly 20 years, with offices in Bend, Seattle, Portland, and Medford. ASI is a firm which believes in growing relationships not acquiring accounts, doing what's right instead of what's easy, and in devoting our time and energy in each client we serve. This philosophy has been rewarded with the majority clients staying with ASI for a decade or more.

Our clients have entrusted ASI with monitoring retirement plans, reserve assets from businesses, endowments & foundations, as well, as creating customized personal wealth plans for our individual clients.

ASI employees work together, to support our client focused philosophy. We're a group of trusted advisors and operational employees who love working together to give our clients the peace of mind they seek in retirement planning and beyond. Most employees have been with ASI for over 10 years, a testament to the positive work environment provided for all staff.

The positive work environment includes a focus on your work/life balance. ASI offers a competitive compensation and benefits package. Some of which includes; generous health insurance benefits, community service leave benefits, additional work/life balance benefits and 401k matching. In addition to the tangible benefits, working at ASI provides a self-motivated, career-minded individual an environment to forge their own career path in the financial industry.

Job Summary – Wealth Management Client Advisor

ASI Wealth Management & Consulting Services is seeking a motivated, client centric Wealth Management Client Advisor to join our team in Seattle, Washington. This is a critical role in the organization and a rare opportunity to join the ASI team. You will be responsible for building long-lasting relationships with current and prospective Private Wealth and Institutional clients. This role's mission is to ensure client satisfaction through exceptional service while operating with integrity second to none. This individual will be enthusiastic, career-minded, and self-motivated. Full-time, with flexible schedule as an option. Competitive compensation and benefits package.

ASI Wealth Management & Consulting Services



Key job functions include but not limited to:

- Maintain on-going client contact and develop in-depth knowledge of each client in the Seattle office to create highly personalized service – strengthening rapport between ASI and the client
- Key role in financial planning for private wealth clients
- Build new relationships with accountants, estate attorneys and other organizations to promote the visibility of ASI in the community and attract new client referrals
- Schedule client meetings to review investment portfolios and economic information as needed
- Represent ASI in the community
- Work with senior management on client-related tasks

Required Skills & Experience:

- Strong interpersonal communication skills; Professional, assertive, and effective in understanding client needs and communicating client benefits
- Expected to be current with industry trends, terminology, and concepts
- Exposure to Financial Planning software
- Exceptional client service skills
- Minimum 4 years experience within a wealth management/asset management environment
- Team oriented
- Passion for learning
- Series 7, 63, or 65 required
- Undergraduate degree required
- Demonstrated ability to be a self-starter, work independently and accomplish goals with minimal direction and supervision.
- Proficiency in Microsoft Office Suite (Word, Excel, PP) required; Junxure, Tamarac Advisor View, Financial Planning software a plus.

Please submit your resume to: info@asiwealthmanagement.com

We look forward to hearing from you.

ASI Wealth Management & Consulting Services

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