Wealth Advisors- Associate

ABOUT AGH:
AGH Wealth Management, as a division of AGH provides investment advisory and comprehensive wealth planning services for organizations and individuals, offering professional guidance and strategies to help build, preserve, and protect wealth. AGH, its parent organization, is one of the top 200 CPA and advisory firms in the U.S., AGH serves closely held and privately owned entrepreneurial firms and high-net-worth individuals and families. AGH is based in the central U.S., but the firm's reach and specialized expertise available to clients spans the globe.

POSITION SUMMARY:
The Wealth Advisors Associate provides support for investment and planning clients, including preparing client meeting materials, participating in meetings, and completing follow-up tasks. The role also supports new business initiatives, assists with cost-effective solutions for planning services, and promotes AGH Wealth Management's services to the community.

ESSENTIAL RESPONSIBILITIES:

Client Service & Advisory Support
- Assist lower-tier advisory clients with the intent of becoming the primary advisor over time.
- Support lower-tier planning clients with the intent of becoming the primary planner following CFP certification.
- Participate in client meetings and complete follow-up tasks to ensure consistent and high-quality service delivery.
- Provide backup support for client service needs during peak service periods.

Meeting Preparation & Client Engagement
- Prepare client meeting materials, reports, and supporting documentation.
- Participate in client meetings as needed to support advisors and planners.
- Assist with planning and execution of client and prospective client events.

Planning & Service Model Development
- Assist in the development and implementation of cost-effective, lower-tier planning service offerings.
- Help develop and operate an in-depth service model related to trust account servicing.

Business Development & Operations Support
- Take on new business initiatives as directed by firm leadership.
- Provide backup assistance for new account setup and other administrative operations as needed.
- Support administrative workflows to ensure accuracy, efficiency, and compliance.

WORK ENVIORNMENT:
This position is an in-office role and requires regular, on-site presence during standard business hours. The Wealth Advisors Associate works in a professional office setting that involves frequent interaction with clients, advisors, and internal team members. The role requires the ability to manage multiple priorities, collaborate across departments, and maintain a high level of confidentiality and professionalism in a fast-paced environment.

QUALIFICATIONS:

- Bachelor's degree in Accounting, Finance, or equivalent combination of education and experience
- Series 7, 66 Required
- CFP® Certification Preferred
- High attention to detail and accuracy
- Ability to work independently
- Proven ability to communicate to all levels of employees and clients
- Respectful of confidential information
- Demonstrated time management skills
- Strong problem-solving and decision-making skills

WHY WORK FOR US:

At AGH, you'll find an environment where good work is rewarded, and growth is valued. AGH offers competitive wages to qualified individuals and the opportunity to grow professionally and personally through diverse work experiences and formal training. Our top five people initiatives are:

- A challenging variety of work in a continuous learning environment
- Career/life integration
- Flexible work environment with great opportunity for advancement
- Ability to make a difference with clients and influence the AGH culture
- Individualized career pathing