Associate Financial Adviser

Location: Falls Church, VA

Job Type: Full-time, Flex hours, Remote 3 days/week

CJM is a leading financial advisory firm dedicated to providing comprehensive wealth management solutions to our clients. With a focus on personalized service and strategic financial planning, we empower individuals and families to achieve their financial goals and secure their future.

Job Description:
We are seeking a highly skilled and motivated Associate Financial Adviser to join our team. This individual will work closely with the lead planners and our team of Financial Advisers to support the financial planning process and deliver exceptional service to our clients. This is a paraplanner support position that does not require 'selling' or finding new clients. The ideal candidate will have a strong background in financial planning, excellent analytical skills, and a passion for helping clients achieve financial success. For the right person, this position offers a pathway toward a Financial Adviser role, supported by hands-on mentorship along the way.

Responsibilities:
1. Assist lead planners in gathering client data and conducting comprehensive financial analyses.
2. Prepare financial planning analysis and presentations for client meetings.
3. Collaborate with lead planners to develop customized financial plans tailored to each client's unique goals and circumstances.
4. Assist in the implementation and monitoring of client investment strategies.
5. Maintain accurate client records and ensure compliance with regulatory requirements.
6. Provide exceptional service to clients by addressing inquiries and resolving issues in a timely and professional manner.
7. Stay current on industry trends, regulatory changes, and new financial planning tools and technologies.

Qualifications:
1. Bachelor's degree in Financial Planning, Finance, Economics, or related field.
2. On the path to obtaining the Certified Financial Planner™ (CFP®) designation.
3. Minimum of 2-3 years of work experience, preferably in financial planning or wealth management.
4. Strong analytical skills and attention to detail.
5. Proficiency in financial planning software and Microsoft Office Suite.
6. Excellent communication and interpersonal skills.
7. Commitment to upholding ethical standards and maintaining client confidentiality.

Benefits:
- Competitive salary and bonus commensurate with experience
- Comprehensive benefits package including employer-paid health insurance, HSA, 401(k) retirement plan with profit sharing and matching, EZ Pass Reimbursement and paid time off
- Unique team benefits such as Alternate Fridays off in the summer, flexible starting hours, hybrid WFH, and Volunteer Days
- Opportunities for professional development and career advancement such as providing FPA membership and support to attend conferences
- Dynamic and supportive work environment with a focus on teamwork and collaboration

Salary Range: $85,000-$115,000 annually, plus eligibility for annual bonus and company benefits.

Click here to apply →

cjmltd.com (703) 425-0700
3110 Fairview Park Drive Suite 900, Falls Church, VA 22042

CJM WEALTH ADVISERS