APCM WEALTH MANAGEMENT
FOR INDIVIDUALS
Registered Investment Adviser

At APCM Wealth Management for Individuals (AWMI), we are a team of smart, driven and capable professionals who enjoy autonomy and flexibility due to the respect we have for each other. Together we approach our work of defining team goals, and the tasks to achieve them, with energy and passion. Individuals' strengths and interests are fostered through continual professional development and mentoring. We are looking for a dedicated professional who values the trust instilled in us by our clients and thrives in a team environment.

Position: Associate Financial Advisor Level 1

AFA1	
Client Responsibilities	Interact with clients with supervision and through assignment of tasks from Lead advisor
Team Responsibilities	Willing to work in a team environment and be a great teammate
Firm Responsibilities	Learn and embrace the firm's vision, mission and values Engage in teamwork and teambuilding and integrate into the culture of the firm
Growth Responsibilities	Support Advisors by participating in research and projects for the current management and future growth of the firm
Degrees and Designations	Minimum Bachelor's degree from an accredited university or college
Experience	Zero to three years
Skills Required	Strong written and oral communication skills Understanding of basic financial concepts
Skills to Develop	Core knowledge of the financial industry, investments, and financial planning concepts Knowledge of the firm's core systems; Microsoft 365 and Office platform Learn and follow firm's procedures, protocols, workflows Ability to perform basic financial analysis Knowledge of planning areas including financial planning, investments, budgeting, taxes, risk management and estate planning Professional networking and community involvement encouraged
Performance Measures	Advancement of technical skills Proficiency in firm software, technology, workflows Development of oral and written client communications Initiate plan for Series 65 licensing Enroll in CFP® Designation program Participation in team dynamics
Compensation	Full-time salaried position with standard benefits package; 401(k) and Cash Balance Pension plans; incentive and discretionary bonus plan

Additional Details on Anticipated Responsibilities and Duties:

- Gather, organize, and synthesize client information for preparation of financial plans and strategies
- Learn firm specific software, including MoneyGuide ProFP, Orion, and Salesforce
- Input data into financial planning software, draft basic illustrations
- Organize client financial information and electronic case files, preparing reports, letters, and other correspondence, and completing special projects as appropriate
- Prepare for client review meetings, financial plan updates, portfolio reviews, gather client data/information, and implement recommendations
- Work with the Client Service team to learn and follow procedures and protocols concerning all workflows and corresponding tasks
- Initially attend client meetings in a technical, supporting and learning role
- Progress to participate in client meetings, assist in presenting financial plans and recommendations
- Assist with client asset management, including coordination of complete financial planning and wealth management integration (analysis, estate planning, tax strategies for assets under management, and portfolio rebalancing)
- Participate in comprehensive financial planning for clients, including coordination of asset management, estate planning and risk management
- Attend team meetings, volunteering for research, new initiatives, and management projects for the internal operation of the team

Career Path:

This position is expected to progress to Associate Financial Advisor Level 2 (AFA2) within 12 to 24 months. Mentoring will be provided to promote skills for excelling at your position, contributing to the business beyond standard job functions, and promoting your development.

Firm Values:

- Maximum benefit/minimal fees for the client is top priority
- We are industry experts with the highest credentials
- Work and life balance is part of our culture
- Profitable clients provide momentum for continued success
- An engaged team contributes to a great work environment