MILESTONE WEALTH
An Independent Practice

HIRING
Relationship Manager/Associate Wealth Manager

Looking for a rewarding career in the financial industry?

Join our team at Milestone Wealth and begin developing relationships with our clients and supporting their needs, with the goal of attaining your CFP and becoming an Associate Wealth Manager within two years.

Responsibilities:

- Client Service: Personalized support ensuring exceptional client satisfaction.
- Client Meetings: Attend, record notes, and assist with post-meeting tasks.
- New Accounts: Seamless account openings with personalized onboarding.
- Account Transfers: Efficient handling of account transitions and consolidations.
- Investment Research: Gather, input, and analyze data on investment managers.
- Support: Assist the current Associate Wealth Manager in addressing the client's financial goals.

Qualifications:

- College degree preferred
- 2+ years of financial industry experience preferred
- Excellent communication skills – upbeat and friendly
- Advanced skills in Microsoft Office (Word, Excel, Outlook, PowerPoint)
- High levels of integrity and discernment
- Excellent organizational and time management skills
- Superior multi-tasking and follow-through abilities
- Team player

We are proud to offer:

- Competitive salary based upon experience
- Bonus opportunities
- Benefits package including medical and disability insurance
- 401k match of 6%
- Paid time off
- Great training
- Beautiful office environment
- Education Incentive Plan

Interested?

If you are looking for a position where what you do makes a difference, please apply and send a copy of your resume to: **hiring@milestonewealthusa.com**.

Learn more about our growing company at **MilestoneWealthUSA.com**.

Why Join Us?

Our company believes that we are only as good as the people we employ. Join a company that values its employees and rewards them for a job well done! Our vision is to be the most successful independent wealth management practice in eastern North Carolina. Our mission is to empower families to be faithful stewards of their finances to achieve their life goals and leave an enduring legacy.