



**Austin Asset**  
AUTHENTIC ADVICE. FOR LIFE.

## **Wealth Management Associate**

### About this role:

Austin Asset is seeking an experienced associate to join our wealth management team. This position is responsible for ensuring that client financial assets are invested in a manner consistent with each client's investment policy statement and the firm's overarching investment philosophy.

### Required Qualifications:

- o Series 65 (or CFP®/CFA) required to trade. If candidate lacks this requirement, we can work to support the employee to attain the Series 65 once hired. Passing this exam would be a conditional requirement to maintain employment.
- o Strong knowledge of Excel and MS suite are required.
- o Experience with trading and research platforms preferred.
- o Previous trading experience preferred.
- o Self-motivated with high personal accountability.

### Essential Functions:

1. Execute trades on behalf of clients to ensure compliance with Investment Policy Statement.
2. Assist Wealth Management team with administrative duties related to investment policy.
3. Proactively assist with meeting preparation, research, and data integrity.

### Compensation:

Base Annual Salary \$65,000-\$85,000; plus bonus

*Austin Asset is an equal-opportunity employer, committed to the strength of a diverse workforce. Individual must be authorized to work in the US.*



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NOTES:

Hybrid/Remote work is allowed.

Robust benefits include company-paid health, dental, vision, and disability insurance. Generous annual paid time off allowance. Non-elective company match for 401k retirement plan.

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