Registered Associate

Acadium Financial Partners is an independent financial planning company with offices on the east and west coasts of South Florida. We align our clients' assets with their values and to help people to live the most fulfilling and impactful lives that they can. We do this through holistic financial planning, evidence-based investing, deep expertise, and a business model that puts our clients first all the time.

Acadium continuously strives to enhance the value that we bring to our clients' lives, and our company is growing quickly. We believe that being the ideal fit for the right people is better than trying to be a merely acceptable fit for everyone, especially when it comes to our teammates. An opportunity exists to become a full-time part of our cultivated client experience.

Acadium is seeking a Registered Associate to join our family and to build their career with. Our ideal teammate is a process-driven problem solver who is passionate about delivering flawless client service while developing their own financial planning expertise.

Responsibilities

- Schedule appointments and maintain calendars
- Prepare, distribute, and receive client communications
- Answer and direct phone calls
- Perform client account maintenance as appropriate
- Manage the new account onboarding process
- Actively listen to clients and attempt to proactively anticipate needs
- Support Acadium advisors in researching and solving complex client issues. This will require interaction with third parties on behalf of clients and advisors, including insurance carriers, tax or legal professionals, and marketing/technology support vendors
- Generate, implement, and monitor client financial plans in concert with advisors
- Placing trades, managing cash, and otherwise assisting with client transactions as needed

Who we are looking for

- An effective and responsive communicator, able to work quickly and efficiently while maintaining a high standard of execution and good judgement.
- Experience in administrative support and customer service preferably in the financial services industry. An expert in implementing and improving processes.
- A person who craves continual growth, achievement, and finds joy in learning.
- A professional who instinctively and unremittingly adheres to the fiduciary standard of care.
- Fluency in the Microsoft Office suite, Zoom, Calendly is required. Experience with CRM, financial planning, and trading software typical to our industry is highly preferred.

Preferred Qualifications

- SIE as required plus Series 7, 63, 65 and 66 if applicable. Florida 2-15 is desirable.
    - Candidate must maintain or be able to obtain the above qualifications within 12 months of employment.
- Ability to obtain additional securities and advisory state registrations as needed.
- Advanced designations, particularly the CFP®, are highly preferred.

Salary and Benefits

- Performance-based increases annually.
- Health insurance and employer sponsored retirement plan benefits plus annual bonuses.
- Technology will be provided for both office and remote work. Position includes the flexibility to work from home or in office as desired in pursuit of your optimal work-life balance.
- Professional growth, including sponsored licensing, attainment of industry designations, and other areas of professional development
- A family-based culture and a closely-knit team of like-minded, responsive, and driven colleagues, passionate about helping you achieve your professional and personal goals.