**About Our Firm**

Describe your firm in a few sentences – What is the overall goal of the firm? Who do they serve? What does it feel like to show up to work each day?

**Information about the role**

Briefly summarize the role. The details of the job’s responsibilities will be outlined below, so rather than focusing on primary responsibilities, talk about how this role fits into the firm’s big picture. If you can, focus on what differentiates this associate advisor role from others!

Is this role fully remote? Hybrid? In-person?

**Skills/Certifications Required, If Any**

Or specify what *will* be required after starting the role!

**Job Responsibilities**

See the sample bullet points on page two. Outline the key areas where the associate advisor will assist the most.

[Primary Job Responsibilities – maximum 6 bullet points]

[Secondary Job Responsibilities – maximum 6 bullet points]

**Other Information**

How to apply, compensation range, benefits, and anything else.

**Potential points to include in a job description:**

Assisting with client onboarding, including:

* Inputting client data and linking accounts.
* Drafting initial information entry and flagging potential issues, such as insurance gaps or unusual retirement details.
* Developing preliminary internal recommendations for lead advisor review.

Assisting with client meeting preparation and follow up, including:

* Documenting processes and updates.
* Creating agendas based on CRM notes.
* Logging client communications and ensuring all details are documented.
* Flagging both personal and financial points that should be addressed during meetings.
* Reviewing and correcting AI-generated meeting notes.
* Assigning follow-up actions to appropriate team members.
* Drafting client emails to confirm changes and plan updates, subject to review.

Assisting with incoming client requests, including:

* Acting as the first point of contact for incoming client questions or concerns.
* Ensuring prompt acknowledgment and follow-up so clients feel supported.
* Taking first passes at CRM updates or plan adjustments before lead advisor review.

Other

* [What else is not uniquely suited to the senior advisor’s skillset?]