



Associate Advisor

As a primary Fiduciary, Petersen Hastings serves committed investors with complex financial needs. Our multigenerational team of experienced and credentialed professionals delivers innovative solutions through The Trusted Financial Path™ to enhance and preserve wealth.

Overview

The Associate Advisor is responsible for assisting the Advisor Team in managing existing client relationships and supporting their business development efforts. This position formulates and implements advice but also relies on technical specialists to develop recommendations within an individual specialist's area of expertise. Responsibilities also include monitoring service level data gathering, modeling, case design, scenario building, plan development and presentation development.

Essential Duties and Responsibilities

- Assist in the gathering and organizing of client data necessary to develop a financial plan: client financial statements, tax returns, estate planning documents.
- Utilize various financial analysis programs for the Advisor Teams. Perform review of output for completeness and accuracy.
- Perform a wide range of financial planning duties for both new and existing clients, including retirement modeling, risk management/insurance analysis, educational modeling, estate reviews, tax reviews, and other applicable financial planning topics.
- May attend client meetings in a technical, supporting and learning role.
- Support advisors in managing client service delivery by preparing agendas, organizing plans, anticipating and scheduling client review meetings, and providing appropriate follow-up.
- Participate in portfolio review/monitoring process and work in collaboration with investment team to manage portfolio allocations cash flow, tax issues, etc. associated with client portfolios.
- Compose and generate correspondence and client documents, including spreadsheets and reports.
- Provide support to advisers on research for tasks, clients, and other areas as required.

Prerequisites

Education and Experience

- Bachelor's degree in business administration, finance or related field. Alternative fields of study will be considered.
- Series 65/66 certification or willingness to successfully complete within 60 days of hire.
- Experience and industry designation(s) such as the following: CRPC, CFP, AIF, is desired.



Skills and Knowledge

- Proficient in mathematical concepts and calculations; solid finance fundamentals.
- Excellent research and problem-solving abilities.
- Detail-oriented with a high degree of accuracy.
- Excellent communication and listening skills.
- A Client-first attitude.
- A Team player, collaborative, able to work with and through others.
- Flexible, self-motivated, and an effective time manager.
- Possesses unquestionable integrity.
- Highly proficient in Office 365.
- Willingness and capability to travel: work outside the scope of normal business hours as needed.

Personal and Interpersonal

- Committed to strong values and upholding the highest ethical behavior.
- Adhere to strict standard for confidentiality and discretion of all client information.
- Ability to project a professional image of her/himself and Petersen Hastings to clients, prospects, and other third parties.
- Work well under pressure and willing to contribute to the wider strategic picture.
- Capable of developing partnerships with internal departments and external organizations with clarity, flexibility, and sensitivity.
- Collaborative, able to work with and through others.

About Petersen Hastings

Located in Kennewick, WA, Petersen Hastings originated in 1962 with the promise that the client's interest would be first. As a fee-only independent Registered Investment Advisor we continue to fulfill that promise by acting as a primary fiduciary, serving individuals and families, foundations, and corporate retirement plans. Petersen Hastings provides each and every client with a team experience through The Trusted Financial Path. Petersen Hastings has continued its path of growth in employees, clients, and geographic span to be nationally recognized. A key to this success is dedication to ongoing development of our team of experienced and credentialed professionals, as well as competitive benefits and compensation. For more information about Petersen Hastings, please visit us at: www.PetersenHastings.com.

If you find that you have the above characteristics we invite you to discuss being a part of our PH team. To apply, submit your cover letter and resume to career@petersenhastings.com. Petersen Hastings is an equal opportunity employer.