Wealth Management Associate

Jacksonville, FL · Full-time · **$70k–85k**

Wealth Management Associate
Location: Jacksonville, FL
Salary: $70,000 - $85,000 + Benefits
Benefits: Health/Dental/Vision Insurance, 401(k) w/ match, PTO, Professional Development Support
Job Type: Full-Time | On-site
Typical Hours: Monday–Friday, 40–45 hours/week
Travel: Optional domestic travel
Start Date: ASAP
Sponsorship is not available

Wealth Management Associate Description

Our client in the wealth management industry is looking for a Wealth Management Associate to add to their team in Jacksonville, FL. In this role, you will prepare financial plans, support planning strategies, join client meetings, and help advisors deliver recommendations across investments, retirement, estate, tax, and risk planning. You will not be expected to cold call or build your own book of business. Instead, you will work closely with the firm's owner, gain exposure to complex planning work, and build your expertise, credentials, and long-term credibility within an established firm. This role is designed for someone who brings both technical knowledge and an entrepreneurial mindset, thrives in a fast-paced environment, and takes pride in delivering accurate, thoughtful work. You'll have the autonomy to shape your path within a collaborative firm that values initiative, precision, and strategic thinking. Your ideas will be heard, your impact will be visible, and your compensation will align with the value and experience you bring.

Wealth Management Associate Responsibilities

- Prepare financial plans and planning summaries for advisor review
- Gather and organize client data for planning meetings
- Analyze client goals, cash flow, assets, liabilities, and risk needs
- Support planning across retirement, tax, estate, and insurance topics
- Join client meetings and document follow-up items
- Help advisors prepare and present planning recommendations
- Review financial documents for accuracy and completeness
- Coordinate with internal team members to support client needs
- Maintain accurate records in CRM and planning systems
- Support client retention through responsive, accurate follow-up

Wealth Management Associate Qualifications

- Bachelor's degree required
- Active Series 7 license plus Series 63/65 or Series 66 required
- 3+ years of financial services or wealth management experience required

- Knowledge across investments, insurance, tax, retirement, and estate planning required
- Familiarity with financial planning tools/software & MS Office required
- Proficiency with Excel, Word, and financial planning tools/software required

Apply: https://twonice.hire.trakstar.com/jobs/fk0ziqe/?apply=true

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