FAIRWAY
Wealth Management LLC

Wealth Management Associate

Fairway Wealth Management LLC is a multi-family office providing integrated wealth management and investment advisory services. Founded in 2002, the firm manages over $1.6 billion in assets for high net worth individuals and families in twenty-five different states.

We are in need of a Wealth Management Associate to support our wealth managers in delivering our full range of wealth management services. The ideal candidate will have an Accounting, Finance, and/or Financial Planning undergraduate degree and will have or be pursuing CPA or CFP licensure. Prior work experience, preferably in an accounting firm, family office, or wealth management firm, with exposure to personal income tax returns is desirable.

This is a technical, client-service position responsible for the detailed analytical work in developing comprehensive wealth management deliverables for our clients in support of our team of wealth managers. This role involves a moderate degree of direct client contact as well as contact with clients' other advisors such as attorneys, money managers, and insurance agents. Strong analytical and communication skills are required, as are strong computer skills in utilizing a variety of applications.

Duties include the following:

- Preparation and analysis of long-range projections of changes in net worth and cash flows, including Monte Carlo analysis to assess feasibility of and progress toward specific client goals
- Preparation of Net Worth statements and other financial planning worksheets focused on specific financial decisions, estate planning, investment analysis, insurance needs analysis, etc.
- Preparation and analysis of investment portfolio reports
- Preparation of income tax projections
- Preparation of agendas and analyses for client meetings
- Documenting notes from client meetings and writing of detailed follow-up letters from those meetings
- Quarterly invoice preparation

Desired Applications/Skill Sets:

- Proficiency with Microsoft Word, Excel and Outlook
- BNA Income Tax Planner
- NaviPlan Financial Planning Software
- Morningstar Investment Research
- Salesforce CRM
- Black Diamond Performance Reporting

If interested, send resume to Maria Hinton at mhinton@fairwaywealth.com.