**Financial Advisor**

Do you want to join a firm that will help you take the next step in your career, and develop into a comprehensive financial planner? That will pay for your CFP Financial Planning Program, CFP exam fee, and provide apprenticeship for your CFP certification? Looking for a firm that provides a home, not just a job?

Altfest Personal Wealth Management, a leading independent wealth management firm, is seeking a highly capable, hard-working person to be either a **Financial Advisor** or on a track to be a Financial Advisor, to help formulate and implement investment and financial planning advice, help manage existing client relationships and

participate in new business development activities.   
    
Duties and Responsibilities

As a member of a client advisory team, you will provide:

* Client Service: Actively support and anticipate the financial needs of clients under a Strategic Client Advisor
* Financial Plan Creation: Based on a client’s goals and circumstances, create custom financial plans that address questions such as at when a client can retire with financial security
* Investment Portfolio Creation: Reviewing a client’s current investments and objectives, give a client a picture of his or her current portfolio composition and, within the firm’s guidelines, create a custom portfolio that the firm will manage
* Relationship Management: Help manage a number of client relationships, empathetically advising clients in collaboration with others, while being supported by other members of the team
* Specialization: Be a specialist and leader in a niche area of investments or financial planning. You may participate on the firm’s Investment Committee or Financial Planning Committee covering a segment of the investment universe or a specific area of financial planning.

Qualifications

* 1+ year Finance experience (wealth management experience a plus)
* In the latter stages of the CFP program
* Ability to value customer service as highly as financial returns
* Outstanding written and verbal communication skills, including the ability to simplify difficult financial concepts to educate a less familiar audience
* Detail-oriented
* Self-starter, takes initiative
* Team player, collaborative, able to work with and through others
* Organized and able to set priorities
* Of the highest integrity
* Provides strong, personalized and proactive care for clients
* Desire/ability to work successfully in a small company environment

Salary and Benefits

Competitive pay & incentive bonus based on experience and industry standards

Great benefits, including: Fully paid medical plan (with no in-network co-pays or deductibles), Dental, Vision, Life and AD & D, Long-term disability, Short-term disability, Flexible Savings Account (FSA), Generous 401(k) plan, tuition reimbursement for a financial planning program and exam fee and other relevant lifelong learning programs, Renewal of CFP and CFA designations, Up to $400 for gym reimbursement, Membership to NAPFA, Opportunity to work in a hybrid, partially remote environment.

For consideration, please email your resume with a cover letter to: [HGoldin@Altfest.com](mailto:HGoldin@Altfest.com)

We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, gender, sexual orientation, national origin, disability status, protected veteran status or any other characteristic protected by law.

FIRM PROFILE

Altfest Personal Wealth Management, founded in 1983, is a pioneer in the fee-only Wealth Management movement. Fee-only means that the firm receives fees only from its clients and not from commissions and the sale of products, which can otherwise lead to conflicts of interest.  The firm provides clients with investment management, retirement planning, insurance, tax and estate advisory.

Altfest Personal Wealth Management is dedicated to putting clients’ interests ahead of its own, hiring highly talented people who work as a team to develop the best strategies for clients. We utilize internal experts that specialize in a variety of technical areas and client segments, and are dedicated to providing a personal, warm, caring atmosphere and a high level of service for clients. We are committed to introducing innovative methods to the profession that increase the value we provide to clients.

Altfest Personal Wealth Management has been named one of AdvisoryHQ’s “Top Rated Financial Advisors in New York City” in 2018, 2019 and 2020.

The firm is proud to be honored by InvestmentNews as one of the “75 Best Places to Work for Financial Advisers” nationwide in 2020 and 2019, as well as a 2020 Best Places to Work in NYC by Crain’s New York.

Lewis Altfest, Ph.D., CFA, CFP®, CPA, PFS, founded the firm after leaving Lord Abbett & Co, a large mutual fund company where he was a Partner and Director of Research. Lew has been named repeatedly to Barron’s “Top 100 Independent Advisors” as well as Barron’s state-by-state listing of “America’s Top 1,200 Financial Advisors”, among many other acknowledgements.

Karen C Altfest, Ph.D., CFP® joined the firm in its early years and has had a strong impact on its growth. Karen oversees the firm’s marketing activities and has made a profound impact by dedicating herself to the empowerment of women. Among her acknowledgements, Karen has been recognized by Forbes as a “Top Women Wealth Advisor” by Forbes from 2017-2020, as well as a Forbes “Best-in-State Wealth Advisor” from 2018-2020. She has also been featured in Crain’s New York Business’ list of “Notable Women in Finance” in 2018 and 2019.

Andrew Altfest, MBA, CFP® has spearheaded several initiatives to expand the firm since joining in 2003, including organizing different practice groups focused on client segments, launching private equity solutions, and directing the firm’s Young Professionals group. He is also an active member of Altfest’s Investment Committee and the Portfolio Action Group, which sets investment strategy for client portfolios. Andrew was named a “Best-In-State Wealth Advisor” by Forbes in its 2018, 2019 and 2020 rankings, as well as a Young Advisor to Watch by Financial Advisor in 2020. He also was included in Forbes’ list of America’s Top Next-Generation Wealth Advisors in 2017, 2018 and 2019.

The firm's culture is very collegial with a family atmosphere where we care for our employees. Our team is very analytical, hardworking and yet looks to develop new ideas that will help it sustain and accelerate our growth into the future.