

Position Title: Advisor Support Associate
Position: Remote
Employment Type: Full Time
Hours: Monday-Friday; 8:30am - 5:30pm CST



The Opportunity: As an Advisor Support Associate at IronPoint Advisors, you are a critical partner to our Financial Advisors, providing the expertise and problem-solving that keeps their practices running smoothly. You coordinate Advisor onboarding, manage complex service requests, and serve as the primary resource for systems, processes, paperwork, and technology. By researching issues, implementing solutions, and collaborating with the Operations Team, you help streamline workflows and strengthen the Advisor experience. Your work ensures our Financial Advisors have the support and confidence they need to serve their clients effectively and grow their businesses.

About Us: IronPoint Advisors exists to serve and empower independent Financial Advisors, and every member of our team plays a vital role in making that mission real. We focus on reducing complexity, streamlining processes, and providing the operational, compliance, and strategic support that allows Advisors to deliver exceptional service to their clients. Our work strengthens their independence while ensuring they never have to navigate challenges alone. With decades of industry experience and a collaborative network of professionals, we give advisors the tools, guidance, and community they need to grow confidently and sustainably. As employees of IronPoint, we are united by a shared commitment to helping advisors succeed, and by extension, supporting the clients and communities they serve.

Key Responsibilities:

- Facilitate the onboarding of new Financial Advisors by coordinating the new account opening process from beginning to end, including the collection of necessary documentation, and liaising with broker dealer, Wealth Advisors, and clients to ensure accurate setup of investment accounts and sponsor changes.
- Facilitate client service request tickets; including conducting research, implementing process or solution independently and/or in partnership with Financial Advisors.
- Lead compensation inquiries and resolutions; including research, liaising with broker dealer and Wealth Advisors.
- Support Financial Advisors by handling paperwork, data entry, and process-related inquiries, including insurance, alternative investments, trust documents, mutual funds, and related financial products
- Partner with Operations Team to troubleshoot system or process challenges and implement efficient process changes.
- Assist with process and data challenges and research in security trading platforms such as Pershing (NetX360) and National Financial (Wealthscape).
- Maintain client information and notes in Redtail (CRM).
- Lead technology changes and large rollout from broker-dealer and/or other key partners.
- Contribute to the development and enhancement of operational processes and procedures.
- Other duties as assigned.

Qualifications:

- Minimum of 5 years of operations or registered assistant experience in wealth management
- Familiarity with security trading platforms such as Pershing and National Financial preferred
- Ability to work independently with a high degree of self-direction and adaptability, proactively managing multiple tasks and promptly addressing client needs.
- Excellent organizational and problem-solving skills, with exceptional attention to detail and follow-through.
- Proficiency in computer applications such as Adobe Acrobat Pro, CRM systems, and Microsoft Office Suite (Windows, Word, Excel, PowerPoint).
- Strong work ethic, punctuality, dependability, and professionalism
- Collaboration skills and the ability to thrive in a team-oriented culture.
- Maintains high ethical standards and confidentiality, exercising discretion when handling sensitive information.
- Outstanding interpersonal, written, phone, and email communication skills.

Position Details:

- Benefit Eligible: Group health insurance, 401k retirement with employer contribution, Paid vacation, sick, and holiday hours
- Opportunities for professional growth and development; including continuing education.
- A supportive and inclusive work environment where your contributions are valued.