Position Title: Advisor Support Associate
Position: Hybrid – San Diego Office
Employment Type: Full Time
Hours: Monday-Friday; 8:30am - 5:30pm PST

IRON POINT
—FINANCIAL ADVISORS—
www.ironpointadvisors.com

The Opportunity: As an Advisor Support Associate, you will play a key role in delivering a seamless, high-quality experience for both clients and advisors. This position is responsible for managing the full lifecycle of client accounts, from onboarding and account maintenance to money movement and ongoing service support, ensuring all requests are handled accurately, efficiently, and in compliance with industry standards. You will work closely with advisors, custodians, and clients to coordinate account activity, resolve issues, and support important processes such as distributions and estate-related requests. This is a hands-on role ideal for a detail-oriented professional who takes pride in ownership, thrives in a collaborative environment, and is committed to providing exceptional client service.

About Us: IronPoint Financial Advisors is a boutique advisory firm and we help individuals, families, and business owners make confident financial decisions through personalized financial planning, investment management, and retirement guidance. We pride ourselves on building long-term relationships and delivering a high level of care and service to every client. Our team combines deep industry experience with a collaborative, client-first approach that helps simplify complex financial decisions.

Key Responsibilities:

- Serve as a primary point of contact for clients by answering incoming calls, assessing needs, communicating relevant information to advisors.
- Facilitate the onboarding of investment clients 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.
- Lead client meeting coordination and assist with preparation and follow up including gathering data, preparing paperwork, etc.
- Handle routine client account maintenance items, such as processing name and address changes, bank authorizations, and responding to client queries or issues.
- Assist with client service items like beneficiary distributions and settling estates.
- Handle routine maintenance like name or address changes and bank authorizations.
- Execute money movement and asset transfers as directed including client deposits, rollovers, withdrawals, and internal transfers while adhering to regulatory requirements and internal policies, utilizing security trading platforms such as Pershing (NetX360) or National Financial/NFS (Wealthscape)
- Maintain client information and notes in Wealthbox or Redtail (CRM).
- Assist with Required Minimum Distributions (RMDs) and Qualified Charitable Distributions (QCDs)
- Follow up with vendors, product sponsors, insurance firms, and custodians for documentation or inquiries on behalf of clients and/or Financial Advisors.
- Coordinate the procurement of client gifts, cards, and flowers to acknowledge milestones and life events.
- Other duties as assigned.

Qualifications:

- Minimum of 2 years of operations, admin support, 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, Paid vacation, holidays