Position Title: Advisor Support Associate
Position: Onsite – Victor, New York
Employment Type: Full Time
Hours: Monday-Friday; 8am-5pm PST

The Opportunity: As an Advisor Support Associate at Evolution Financial Advisors (EFA), you are a critical partner to our Financial Advisors, providing the expertise and problem solving that keeps their practices running smoothly. In this role, you lead the EFAssist program for assigned advisors, serving as the primary point of coordination for client service and operational support. Additionally, you support the broader EFA Financial Advisors and business. You'll 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 EFA 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: Evolution Financial Advisors is a services firm dedicated to empowering independent financial professionals. We partner with independent financial advisors across the country to help them grow, scale, and operate more efficiently. Our mission is to enable advisors to focus on helping clients achieve their financial goals by simplifying business operations, succession planning, compliance management, and back-office support. We form successful partnerships with advisors and firms committed to growth and operational efficiency.

Key Responsibilities:

- Lead EFAssist Program: For assigned Financial Advisors, assist with client service support including;
    - 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.
    - 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
- Facilitate client service request tickets; including conducting research, implementing process or solution independently and/or in partnership with Financial Advisors.
- Lead compensation inquires and resolutions; including research, liaising with broker dealer and Financial 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 EFA Team to troubleshoot system or process challenges and implement efficient process changes.
- 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, Financial Advisors, and clients to ensure accurate setup of investment accounts and sponsor changes.

- Assist with process and data challenges and research in security trading platforms such as Pershing (NetX360).
- Maintain client information and notes in Redtail (CRM).
- Contribute to the development and enhancement of operational processes and procedures.
- Other duties as assigned.

Qualifications:
- Minimum of 2 years of operations, advisor support, or administrative support, preferably in wealth management or financial services
- Familiarity with security trading platforms such as Pershing 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, group dental insurance, Group life insurance and AD&D, 401k retirement with employer contribution, Paid vacation, sick, and holiday hours
- Position is onsite in Victor, NY office
- Opportunities for professional growth and development; including continuing education.
- A supportive and inclusive work environment where your contributions are valued.