



GENOVESE BURFORD & BROTHERS

BUILDING TRUST. BUILDING WEALTH.

Position: Advisor Support Associate

Dept.: Wealth Management

Location: Sacramento, CA office

Status: Non-Exempt, Full-time

Founded in 1987, Genovese Burford & Brothers (GBB) is a leading independent wealth management firm based in Sacramento, CA. We offer financial planning and investment management services to individuals, families, and institutions, and retirement plan services to businesses.

GBB is growing, and we are seeking an Advisor Support Associate (ASA) to join our financial advisory team. The ASA will work closely with Financial Advisors to improve productivity and the quality of services provided to clients, and must fit within our culture of integrity, teamwork, and putting clients' interests first. Primary responsibilities may include the following, among others:

- Para-planner activities, including assisting with gathering client information and the construction of high-quality financial plans
- Presenting financial plans to clients
- Client outreach and marketing activities (not sales)
- Account reviews to determine need for allocation changes
- Learn the portfolio management systems and provide trading support
- Periodic research reviews of mutual fund/ETF holdings and peer group analysis
- Ad hoc investment and market research

Minimum requirements for consideration for the Advisor Support Associate role are:

- Bachelor's degree from an accredited college or university
- Resume and cover letter
- Clean criminal and regulatory record

In addition, Advisor Support Associates will be expected to successfully pass the FINRA Series 7 and 66 licensing exams within one year of employment with the firm.



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Strong candidates will offer the following:

- Certified Financial Planner™ (CFP®) designation, or progress toward the designation
- 2-4 years of work experience relevant to financial planning or wealth management
- Business or economics background with a high degree of financial fluency
- Excellent problem-solving skills and the ability to work independently
- High level of organization and attention to detail
- Ability to prioritize tasks and to manage multiple reporting relationships well
- Strong communication skills
- Service orientation
- Team player, collaborative, able to work with others
- IT skills – Excel, Money Guide Pro, and Morningstar Direct knowledge a plus
- 3.0 or higher GPA

GBB offers competitive compensation and benefits, commensurate with experience. Genovese Burford & Brothers is an equal opportunity employer. For more information, visit us at <http://gbbwealth.com/careers>.