

Wealth Advisor

Location:

Job Type: Full-time

Reports to: Executive Director of Wealth Advisory

About Balefire

At Balefire, we're on a mission to redefine financial advisory services by combining collaboration, innovation, and integrity. We're a national firm built on teamwork and shared success, where employees are empowered to make an impact, grow their expertise, and serve clients with purpose. With a culture that values continuous learning and bold thinking, Balefire provides an exciting environment for professionals who want to build meaningful careers while helping clients achieve long-term financial success.

Role Overview

As a Wealth Advisor, you'll be a trusted partner to individuals and families, providing personalized financial guidance and investment management tailored to their goals. You will collaborate with other advisors and internal teams to deliver a comprehensive wealth management experience. This role is ideal for someone passionate about building relationships, solving complex financial challenges, and helping clients achieve financial clarity and confidence.

Key Responsibilities

- Collaborate with advisory and financial planning teams to deliver holistic financial strategies.
 - Conduct detailed financial assessments, identifying client goals, risk tolerance, and priorities.
 - Develop personalized financial plans covering investment strategies, retirement, estate, and risk management.
 - Provide ongoing monitoring, reviews, and adjustments to client plans as circumstances and markets evolve.
 - Serve as a trusted advisor, offering guidance to help clients achieve financial objectives.
 - Stay current on industry trends, regulations, and best practices to ensure compliance and deliver relevant advice.
 - Cultivate meaningful, long-term client relationships through proactive communication and exceptional service.
 - Contribute to business growth through client acquisition, retention strategies, and collaboration with team members.
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Qualifications

- Bachelor's degree in finance, business, economics, or related field; advanced degrees or certifications (CFP, CFA, ChFC, FINRA licenses) preferred.
 - Proven experience in financial planning, investment management, or wealth advisory roles.
 - Strong understanding of financial markets, investment solutions, and planning strategies.
 - Excellent analytical and problem-solving skills.
 - Outstanding interpersonal and communication abilities, with the ability to build rapport and explain complex concepts clearly.
 - Commitment to integrity, professionalism, and ethical conduct.
 - Proficiency with financial planning tools and CRM systems.
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Compensation & Benefits

Balefire offers a competitive compensation package designed to reward performance and support your overall well-being. In addition to a base salary and incentive opportunities, we provide a comprehensive benefits program, including:

- Medical, dental, and vision insurance
- Retirement savings plan with company match
- Health savings accounts and wellness resources
- Flexible paid time off and company holidays
- Opportunities for professional development and continuing education
- Collaborative and growth-focused work environment

Specific compensation details will be discussed during the interview process.

Work Schedule

- Monday through Friday, 8:00 AM – 5:00 PM
 - In-office position
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