



HIGHTOWER

Title: Wealth Manager
Department: Bluerock Wealth Management
Manager: Rachael Neil
Location: Alpharetta, GA

Our Story

Founded in 2008, Hightower is a wealth management firm that provides investment, financial and retirement planning services to individuals, foundations and family offices, as well as 401(k) consulting and cash management services to corporations. Hightower's capital solutions, operational support services, size and scale empower its vibrant community of independent-minded wealth advisors to grow their businesses and help their clients achieve their vision of "well-th. rebalanced." Based in Chicago with advisors across the U.S., the firm operates as a registered investment advisor (RIA).

Your Future Team

Bluerock Wealth Management is a fiduciary fee-only firm. Our comprehensive approach covers the full spectrum of wealth management, including investing, financial planning, and tax mitigation. We employ a holistic, data-driven and inclusive approach. We are looking for a Wealth Manager who exhibits these qualities:

- **Client Service.** Client relationships are what make our business successful. Experience in delivering proactive, client-focused solutions in a timely manner is a must. Quick and accurate follow up to client and colleague requests is essential.
- **Insightful.** Possess a strong overall wealth management background to develop comprehensive financial and investment planning for clients. Able to build procedures, think outside the box and streamline processes.
- **Clear Communicator.** Demonstrable ability to communicate, present and provide a concise investment and financial plan tailored for the client. Capability to be a team player working together with colleagues toward the goal of maintaining a positive firm culture.
- **Holistic.** An inclusive approach melding investing, financial planning, and tax mitigations strategies to help create comprehensive results.

What You'll Do

- Deliver a level of personalized, attentive service to clients, eventually serving as the primary resource for clients when it comes to financial needs related to investments, tax planning, estate planning, insurance, education and retirement planning
- Assist with analyses and preparation of prospective and current clients' planning, investments, and conduct in-depth client reviews
- Ability to establish client investment objectives (risk tolerance, asset allocation and cash needs) by strategically thinking around clients' individual situations and identify opportunities or pitfalls that may be present when it comes to all facets of a client's financial picture
- Ability to build trading processes and develop and place trades using asset location, while minimizing taxes and trading fees.
- Possess strong knowledge of the RIA, fee-only space. Understanding of the operations, financial planning and investment sides of the business is a big plus.



HIGHTOWER

- Keep abreast of changing economic, legal, financial planning, investment trends and general market and business issues impacting affluent clients
- Actively work with members of the operations, planning and investment teams to create/incorporate best practices
- Collaborate with CPAs, attorneys and other Centers of Influence to meet client's goals and/or needs

What You'll Bring

- 5+ years in client facing role
- CFP®, CPA or CFA Designation required
- Knowledge of Salesforce, Black Diamond, BNA, eMoney a plus

What We Offer

- Coverage on the first day of employment for medical, dental, and vision insurance
- 401k Matching Plan
- Paid Parental Leave
- Student Loan Assistance
- Pet Insurance
- Flexible Benefits (FSA, Pre-tax transportation, HSA Employer Contributions)
- Remote and or hybrid depending on location

AN EQUAL OPPORTUNITY EMPLOYER: Hightower is an equal opportunity employer and does not discriminate based upon race, color, religion, sex, sexual orientation, pregnancy, marital status, national origin, citizenship, veteran status, ancestry, age (over 40), physical or mental disability, medical condition (cancer-related), gender identity or expression, genetic information including sickle cell or hemoglobin C trait, or any other consideration made unlawful by applicable federal, state, or local law.

You are a U.S. citizen, U.S. permanent resident or possess other unrestricted U.S. work authorization and will not require sponsorship for U.S. work authorization now or anytime in the future.

Hightower requires proof of COVID-19 vaccination for all employees. Reasonable accommodations will be considered.