



WEALTH MANAGEMENT ADVISOR ASSOCIATE

About ML&R Wealth Management

ML&R Wealth Management is a subsidiary of Maxwell Locke & Ritter, the largest locally owned accounting firm in Central Texas. We are an independent Registered Investment Advisor managing \$1.3b in Austin, Texas. For over 20 years, we have served individuals, families, businesses, and nonprofits with wealth management services, custom retirement 401(k) plans, and portfolio management.

Position Summary

Support Wealth Advisory team to manage client portfolios and participate in the advanced planning process to address client goals, estate planning, and tax considerations.

Essential Duties and Responsibilities

- Portfolio management
 - Portfolio implementation
 - Rebalancing
 - Tax loss harvesting
- Prepare for, take part in and follow up from client interactions
 - Consistent communication
 - Meeting participation
 - Meeting preparation
- Consult with Wealth Advisor to provide strategic planning for clients
 - Retirement projection analysis (and asset allocation)
 - Tax planning
 - Estate planning
- Manage client onboarding process
- Learn client processes in order to transition into a full time advisor role

Additional Responsibilities

- Ability to bring advanced planning recommendations to the Wealth Advisor and the client
- Deep understanding of our investment philosophy and ability to communicate our story clearly and with conviction
- Ability to interact with team members to ensure a high level of service for our clients
- Ability to process complex financial scenarios
- Strong communication and listening skills
- Attention to detail and accuracy

Education and/or Work Experience

- College Degree
- CFP, CPA or PFS strongly encouraged
- Series 65

AUSTIN

401 Congress Avenue, Suite 1100
Austin, TX 78701

www.mlrm.com

512-275-2700

ROUND ROCK

411 West Main Street, Suite 300
Round Rock, TX 78664



Benefits and Culture

- Benefits
 - Competitive compensation, 401(k) plan, medical benefits, paid time off and holidays, paid parental leave, and continuing professional education.
- Flexible, Family-Friendly Culture
 - Personalized work schedules, including reduced, flex-time, or flex-place work schedules.
- Annual Profit-Sharing
 - We provide our financial results to our employees and share our success through our annual employee profit sharing plan.
- Career Path and Progression
 - Employee-driven career paths coupled with partner guidance and a commitment to professional development allow us to maintain a low turnover rate.
- Wellness Programs
 - Wellness room with resources for new moms, small group personal training classes, in-house yoga classes, discounted and free gym memberships.
- Community Participation
 - We are involved in over 275 community organizations in the Austin and Round Rock area. When you become a part of our team, you truly become an ambassador to the community you serve.

How to Apply

Please email your resume and cover letter to swasaff@mlrpc.com. For more information about Careers at ML&R, please visit <https://www.mlrpc.com/careers/>. For more information about our Wealth Management practice, please visit <https://mlrwm.com/>.