ML&R Wealth Management, a subsidiary of Maxwell Locke & Ritter, the largest locally owned and managed accounting firm in the greater Austin area is seeking experienced talent to support the wealth management team by providing excellent detail-oriented service to advisor associates and advisors.

Maxwell Locke & Ritter offers customized career paths to its team members and has a strong history of promoting within – 20 of 22 current partners were promoted to partner after demonstrated success at the firm.

Highly regarded in the Central Texas community and the accounting industry at large, the firm has received numerous prestigious awards, including the **"#1 Best Mid-sized Accounting Firm to Work For"** in the nation by *Accounting Today* in 2021 and **2019**. Additional awards can be found on **our website.**

Check out our **Instagram** (@maxlocrit) and visit our **Life at ML&R blog** to get a better idea of our day-to-day workplace **culture**.

Maxwell Locke & Ritter LLP provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

As a firm that embraces people from different backgrounds, we encourage applications from those who identify with the BIPOC or LGBTQ+ communities, possess visible or hidden disabilities, and/or have served in the military. Let us know if you prefer certain pronouns or if you need reasonable accommodations at any point throughout our recruitment and selection process.

Maxwell Locke & Ritter is committed to fostering, cultivating, and preserving a culture of diversity, equity, and inclusion at all levels of our firm. To support this commitment, our **DEI committee** focuses internal efforts on the following strategies:

- Awareness: Firmwide diversity, equity and inclusion education and related community involvement
- Recruitment: Intentional recruiting initiatives, focused candidate outreach and objective hiring practices
- Outreach: Promotion of our profession to secondary students in underrepresented groups

Benefits Include: 22 days paid time off (increases with firm tenure) plus eight paid holidays and two floating holidays, continuing professional education, 401(k) plan including profit sharing contribution, annual bonus through profit sharing plan, medical insurance, cafeteria plan including medical and dependent care flexible spending accounts, dental insurance, vision insurance, term-life and accidental death and dismemberment insurance, short-term disability, long-term disability, employee assistance program, paid parental leave and paid bereavement leave.

(Employees must work a minimum of 30 hours a week to be eligible for the following benefits: Medical, Dental, Vision, Health Savings Account, Limited Purpose Medical Flexible Spending Account, Full Medical Flexible Spending Account, and Dependent Care Flexible Spending Account, Term Life and AD&D, Long-term Disability and Employee Assistance Program.)

Other Perks Include: Family friendly and flexible work environment, firm-wide wellness program and onsite gym access at Frost Bank Tower, discounted monthly parking or commuter pass, firm-wide community service activities, regular firm socials and team-building activities and much more!

Essential Duties and Responsibilities:

- Support advisor associates
- Manage client onboarding process
- Manage client records in CRM
- Manage custodian alerts
- Assist with custodian applications and paperwork

- Assist with quarterly report process
- Assist with estimated tax payments process
- Assist with client meeting preparation
- Provide clerical support to team personnel

Additional Responsibilities:

- Anticipate the needs of the advisor associates and advisors
- Understand the client experience process and suggest efficiencies and improvements as needed

Required Qualifications:

- College degree
- Strong communication and listening skills
- Attention to detail and accuracy
- Process-driven
- Problem resolution skills
- Timeliness
- Proficiency with Word and Excel

More About ML&R Wealth Management

At ML&R Wealth Management, we take investing personally. ML&R Wealth Management advisors work to develop lasting relationships with our clients, keeping in touch to understand their changing goals and to provide an asset management strategy to help achieve them. Whenever our clients need sound financial advice, they have a direct line to a trusted advisor.

For over 20 years, we have served individuals, families, businesses, and nonprofits with wealth management services, custom retirement and 401(k) plans, and portfolio management.

We believe in accountability and transparency and operate as a fee-only advisor with fees calculated solely on assets under management.

ML&R Wealth Management was named the #1 2021 Best Places to Work for Financial Advisers as announced by InvestmentNews.

Disclaimer: Third-party rankings and recognition from ratings services are no guarantee of future investment success. Working with a highly-rated adviser does not ensure that a client or prospective client will experience a higher level of performance or results. Ratings should not be considered an endorsement for the adviser by any client nor are they representative of any one client's evaluation. Generally, rankings are based on information prepared and submitted by the adviser, or the amount of assets under management by the adviser. Please refer to the more thorough disclosure and additional information about the criteria used in making these rankings via the website of the publication and/or organization granting such recognition located **HERE**.