



**AWM's Mission:** to empower each member of our community to own all facets of their wealth in a comprehensive way that maximizes their financial well-being, as well as the impact and legacy they will leave on their community and beyond. AWM works as trusted partners with athletes, business founders, and venture capitalists to help them see that wealth is comprehensive.

**AWM's Values:**

Driven to Win – partnering with clients to make successful lifetime decisions

Impactful – help clients sustain their success by leveraging their wealth to maximize and impact all areas of their lives

Empathetic – going beyond wealth management to look out for clients' best interests in all they that do

Intellectually Curious – always on the hunt for ways to grow, adapt, and improve

Gritty – we're scrappy and we don't quit

Ownership – each team members takes extreme ownership over their own job and our collective work together; we all act as owners in the success of our clients

**AWM Associate Role**

The role of an Associate at AWM is one that seeks to collaborate with all members of the firm to provide the highest level of excellence and service to our clients.

This person prides themselves on being incisive. They strive to constantly improve in everything that they do. They tend to be precise about their use of time and priorities. This person will feel that "quality is job number one" and precision and accuracy are important to them.

A successful Associate will be intuitive and able to ask good questions at the right time in order to get the critical, complete information that they need.

A successful Associate for AWM, should possess the skills below and be prepared to complete the outlined responsibilities.

*Skills:*

- Self-Starter – demonstrates initiative and willingness to get started without a lot of direction.

- Decision Maker – analyzes all aspects of a situation to make consistently sound and timely decisions.
- Continual Learner – takes initiative to regularly learn new concepts, technologies and/or methods.
- Planning and Organization – establishes courses of action to ensure that work is completed effectively
- Conceptual Thinker – analyzes hypothetical situations, patterns and/or abstract concepts to formulate connections and new insights.
- Time and Priority Management – prioritizes and completes tasks in order to deliver desired outcomes within allotted time frames.
- Creative Problem Solver – defines, analyzes and diagnoses key components of a problem to formulate a solution.

*Must haves:*

- Understand and support AWM's Mission and Values
- Be a great teammate & strive to make others look good
- Seek to develop individually

*Responsibilities:*

- Critical member of AWM planning team in servicing clients; this includes direct support of the firm's planners and advisors in their day-to-day client activities
- Assuming primary responsibility for client onboarding, account maintenance, wire requests, custodial alerts, and other client service needs
- Responding promptly to client questions and service requests and following through to make sure tasks are completed
- Admin work on behalf of client including categorizing expenses, preparing meeting documents, and managing a holistic view of client relationships
- Communicating professionally with clients via phone, text, and email
- Participating in client meetings and taking notes for follow-ups & action items
- Maintaining client information & records to ensure they all stay up to date
- Working with the AWM Capital Tax Team to prepare and deliver tax workpapers

*Requirements:*

- Bachelor's Degree

**To Apply: Please send resume to [marissa@awmcap.com](mailto:marissa@awmcap.com)**