



## **Financial Advisor**

Dovetail Wealth Management  
Taylor, TX

Dovetail Wealth Management is seeking a motivated individual for a financial advisor role. The ideal candidate will deliver personalized investment solutions to help clients work toward their financial goals.

### **JOB DESCRIPTION**

- Prepare for and participate in client meetings.
- Create, develop, and edit client deliverables.
- Collect, organize, and analyze client information.
- Prepare and make recommendations for client financial plans and investments.
- Leverage technological platforms to support client and financial transaction related matters.
- Help clients implement recommendations.
- Research issues for clients and take necessary action.
- Support the senior advisor(s) in a multitude of client service and advisory functions.

### **QUALIFICATIONS**

- Bachelor's degree from an accredited university; major in financial planning, business administration, economics, or related field preferred.
- 2+ years of client-facing financial planning experience preferred
- Ability to contribute to business development by identifying and closing new client relationships.
- FINRA Series 7/66 licensing preferred/required upon hire.
- Excellent written and verbal communication skills. Strong interpersonal skills.
- Ability to maintain a high level of confidentiality.
- Working knowledge of MoneyGuidePro and Redtail are a plus.

### **COMPENSATION & BENEFITS**

- Competitive salary based on experience, plus bonus opportunities.
- 401(k)
- Group health and dental.
- Paid vacation days and paid market holidays.
- Continued education: company support of securities licensing and pursuit of the CFP® certification. Clear growth track.
- Potential for company equity.

### **ABOUT DOVETAIL WEALTH MANAGEMENT**

Dovetail Wealth Management is a premier financial planning and wealth management firm in the Greater Austin area. The firm was named to USA Today's Best Financial Advisory Firms list for 2023 and 2024. The practice has been serving clients in central Texas and beyond for over two decades. The growth of the firm has been fueled by its ability to evolve and provide the knowledge and resources to best serve its existing and prospective client base. We offer the ideal candidate the resources that can only come from an established and respected firm that encourages an entrepreneurial spirit.

**Please send resumes to [info@dovetailwealth.com](mailto:info@dovetailwealth.com)**