FIGURE 8 INVESTMENT STRATEGIES

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JOB POSTING:
ASSOCIATE ADVISOR FOR FINANCE & IMPACT

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Figure 8 Investment Strategies is excited to offer this unique opportunity to join the team in our fast-growing impact-focused investment advisory firm. We seek an exceptional financial professional driven to make a difference for clients as they work towards their goals, for our business as we grow and innovate, and for the world as we work to demonstrate the power of investors to create social change.

The Associate Advisor role is an ownership-track growth opportunity that rewards hard work, dedication, and thought leadership. To succeed in this position, you will thrive on building deep and trusting relationships with clients, take pride in producing excellent above-and-beyond work, find fun and joy in collaborating with a diverse group of teammates, and be inspired by the opportunity to work towards environmental sustainability and economic justice. This position is ideally based in our home office in Boise, Idaho, but we will consider a remote work arrangement for the ideal candidate.

Key Responsibilities

In your primary role as Associate Advisor for Finance & Impact, you'll use your comprehensive understanding of financial planning and the markets to advise clients while also helping to define and evolve Figure 8's planning approach. Specific responsibilities include the following:

- Own the full cycle of client relationships from initial strategy discussion to ongoing review meetings of financial planning and investments
- Assess each client's financial circumstances, values, and investment objectives; develop personalized Investment Policy Statements
- Build and deliver comprehensive planning, analysis, and recommendations that align with each client's goals; address issues including cash flow, retirement, estate planning, tax, insurance, philanthropy, and strategies for social and environmental impact
- Embrace Figure 8's sustainability-focused investment strategy, which integrates ESG across asset classes and is built around Figure 8's proprietary active equity strategy
- Monitor client portfolios to ensure they adhere to the outlined plan
- Help expand Figure 8's universe of impact investments and in developing new strategies for matching client's impact goals with specific investment vehicles appropriate for clients' asset level, time horizon, liquidity needs, and risk tolerance
- Manage ongoing client communications and education, answer client questions, and provide regular portfolio reporting on investment performance and social impact
- Assist with Figure 8's marketing; help craft firmwide content and communications; participate in speaking engagements, presentations, and client events
- Continue to develop personal and professional skills, knowledge, and understanding of investment philosophies, impact strategies, and planning practices
- Uphold all compliance and risk procedures, follow corporate and industry protocols, and protect the interest of the client and the firm at all times

Qualifications and Experience

Figure 8 is committed to boosting inclusivity across our firm, our clients, and our industry. As we build our team, we place high value on diverse backgrounds and perspectives. The qualifications that follow are generally required but tell only part of the story; we value your unique lived experience most highly of all.

- Bachelor's degree
- 3+ years' experience in financial advising and planning, wealth management, and/or investment management; experience with sustainable, responsible, and impact investing strongly preferred
- CFP® certification and FINRA Series 65 (either may be obtained as a condition of employment)
- Experience developing, positioning, and presenting comprehensive financial plans and investment strategies to clients and business partners
- Proficiency with financial planning and investment industry software, especially CRM systems (we use Redtail), portfolio reporting and rebalancing (we use Black Diamond), and MoneyGuide or EMoney planning programs; strong ability to learn and apply new software systems quickly
- An overarching passion for helping clients to achieve their goals and to delivering excellent, responsive service; ability to develop and maintain warm, trusting relationships with clients over phone, video, and in person
- Strong interest in and passion for creating impact around environmental sustainability, social justice, multiculturalism and/or community economic development
- Excellent verbal and written communications; multiple language skills are a plus
- Ability to work both independently and as part of the team, in a fast-paced and collaborative environment

Compensation & Benefits
Our compensation is structured to incentivize a collaborative team approach and is based on shared rewards. We offer a comfortable base salary, firmwide profit sharing, and a complete package of benefits including a medical allowance, retirement plan with company match, paid & volunteer time off, and opportunities for learning, training and career growth. The greatest rewards over time will come from this position being an ownership-track growth opportunity.

About Figure 8 Investment Strategies
Figure 8 Investment Strategies is an independent Boise-based Registered Investment Advisor dedicated to providing clients with sustainable investment management, personalized financial planning, and innovative strategies for creating social and environmental impact. Founded in 2016, Figure 8 operates in a fast-paced start-up environment and is a Certified B Corporation dedicated to using the power of business to build a more inclusive and sustainable economy.

Equal Employment Opportunity
Figure 8 provides equal employment opportunities to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, genetic information, disability, or veteran status.

How To Apply
Figure 8 has engaged New Planner Recruiting, a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. To apply, please click http://bit.ly/3o9WsKN , or please send your resume and cover letter directly to recruiter Jayla Blakemore at jblakemore@newplannerrecruiting.com.