ASSOCIATE ADVISOR

Highland Private Wealth Management | Bellevue, WA or Ellensburg, WA

Your Future Team

A fulfilling life is built through purpose, relationships, and meaningful impact. We believe the same is true of a career.

At Highland, we often talk with clients about Living Fully® and aligning their financial resources with what matters most. We believe that principle applies to careers as well. The work you do every day should reflect your values, create meaningful impact, and contribute to a life fully lived.

At Highland, we refer to our advisors as **Wealth Confidants** because we believe the most successful advisors do more than provide financial advice. They build trusted relationships, help clients navigate life's biggest decisions, and help clients use their wealth with greater clarity, confidence, and purpose.

As an Associate Advisor, you'll work alongside experienced Advisors while developing and delivering financial planning and investment recommendations, building meaningful client relationships, and growing into a trusted Wealth Confidant capable of leading client engagements.

Highland Private Wealth Management is a growing advisory practice with offices in Bellevue and Ellensburg, Washington. For more than 25 years, we've served high-net-worth individuals and families through comprehensive wealth planning and investment management.

Rooted locally and powered nationally, Highland combines the personal relationships of a boutique practice with the resources of Hightower Advisors. We manage approximately $2.8 billion in client assets* and remain focused on one goal: helping our clients align their wealth with what matters most.

We're looking for an emerging advisor with a collaborative mindset and a desire to make a meaningful difference in the lives of clients.

Why Advisors Choose Highland

A distinctive approach to advice. Help clients connect their financial decisions with what matters most as you develop the skills and experience to become a trusted Wealth Confidant.

One team, shared success. Work alongside professionals who freely share knowledge, support one another's growth, and collaborate to help deliver successful client outcomes.

A culture of ownership and generosity. Join a team where collaboration, accountability, and investing in each other's success are part of everyday life.

Boutique culture. National resources. Enjoy the entrepreneurial spirit of a boutique team backed by the scale, technology, and resources of Hightower Advisors.

A place to accelerate your advisory career. Learn directly from experienced advisors who are committed to sharing their knowledge and helping develop the next generation of Wealth Confidants.

Deep roots in the community. Represent a team with longstanding ties throughout Washington.

What You'll Do

Manage and deepen client relationships. Serve as a primary point of contact for select client relationships while partnering with Advisors on more complex engagements. Help clients navigate important financial decisions with confidence and clarity.

Develop financial planning analyses and recommendations. Formulate recommendations related to retirement, tax, estate, insurance, cash flow, and investment planning strategies. Present recommendations to clients and collaborate with Advisors on complex planning needs.

Create and present client deliverables. Prepare financial plans, investment recommendations, meeting materials, presentations, and follow-up action plans that help clients understand and implement advice.

Lead implementation. Coordinate the execution of planning and investment recommendations by working with clients, custodians, and outside professionals to work towards successful outcomes.

Lead and participate in client meetings. Present planning strategies, discuss recommendations, and guide clients through financial decisions while building trusted relationships.

Collaborate across the team. Partner with Advisors, Operations, and clients' outside professionals to develop comprehensive solutions and deliver coordinated advice.

Continue growing professionally. Strengthen your technical knowledge and advisory capabilities while expanding your ability to lead client relationships independently. As your responsibilities grow, you'll have opportunities to participate in business development efforts, strengthen professional relationships, contribute to client retention, and support Highland's continued growth.

What You'll Bring

A foundation in financial services. 2+ years of experience in wealth management, financial planning, banking, accounting, financial services, or a related field.

Strong organizational skills. The ability to manage details, follow through on commitments, and maintain accuracy in a fast-paced environment.

Strong advisory and communication skills. The ability to explain complex financial concepts, present recommendations clearly, and build trust with clients and colleagues.

A team-first mindset. A collaborative approach and willingness to learn from others.

A desire to grow as an advisor. Curiosity, initiative, and a commitment to continuous learning.

Bachelor's degree required.

Experience supporting affluent individuals and families preferred. Highland commonly serves individuals and families with approximately $2 million or more in liquid assets.

CFP® coursework or progress toward a professional designation preferred.

Series 65 or ability to obtain within six months of hire preferred.

What We Offer

Competitive compensation aligned with impact. The anticipated base salary range for this position is $120,000–$130,000 annually. This role is also eligible for material incentive compensation tied to client and revenue growth.

Comprehensive health benefits. Medical, dental, and vision coverage beginning on your first day of employment.

Support for growing families. Paid parental leave of 16 weeks for primary caregivers and eight weeks for secondary caregivers.

Retirement savings support. 401(k) plan with employer matching contributions.

Additional financial wellness benefits. Employer HSA contributions, student loan assistance, pet insurance, and other benefits designed to support your personal and professional well-being.

A place to build a meaningful career. Grow alongside a team committed to helping clients and one another thrive.

Hightower's Story

Highland is proud to be part of the Hightower community of independent-minded advisory teams, combining a personalized client experience with the resources of a national wealth management organization.

Founded in 2008, Hightower provides investment, financial, and retirement planning services to individuals, foundations, family offices, and businesses. Its scale, operational support, and resources empower independent-minded advisors to grow their businesses and help clients achieve their financial vision.

Based in Chicago, Hightower operates as a registered investment advisor (RIA) with advisors across the United States.

A Career That Supports a Life Fully Lived

At Highland, we believe meaningful work and meaningful lives go hand in hand. If you're looking for an opportunity to learn from experienced professionals, grow as an advisor, and make a meaningful impact in the lives of others, we'd love to hear from you.

Equal Opportunity Employer

AN EQUAL OPPORTUNITY EMPLOYER: Hightower is an equal opportunity employer and does not discriminate based upon race, color, religion, sex, sexual orientation, pregnancy, marital status, national origin, citizenship, veteran status, ancestry, age (over 40), physical or mental disability, medical condition, gender identity or expression, genetic information, or any other consideration protected by applicable law.

You are a U.S. citizen, U.S. permanent resident, or possess other unrestricted U.S. work authorization and will not require sponsorship now or in the future.