



DALLAS • NEW ORLEANS • SAN ANTONIO

## **Position: Staff**

### **Firm Description**

Southern Wealth Management (SWM) is a multi-family office that provides wealthy individuals and families the ideal combination of experience and knowledge to help them make more informed financial decisions, and to better understand the implications of those decisions. We provide a highly personalized, coordinated family office approach to addressing a client's financial situation. Our seven core disciplines are:

- Financial and estate planning
- Business succession planning, including business valuation
- Tax consulting, compliance and filing of returns
- Investment portfolio design and management
- Life insurance portfolio design and management
- Philanthropic planning and plan management
- Family office services such as bookkeeping, bill pay and management of holdings

SWM is currently looking for a recent college graduate to fill a Staff position that will assist in several client service areas, including Investment Advisory Services, Income Tax Compliance and Consulting, General Financial Planning, and Risk Management.

### **Position Description**

Working primarily in the investment practice, this person will prepare financial analyses related to various investment and financial planning issues; generate and analyze investment performance reports via established software; assist in communicating with custodians, money managers, other 3<sup>rd</sup> parties and clients. In addition, it is anticipated that this position will provide support for the income tax and risk management practices.

### **Requirements/Qualifications**

- This is an entry-level position (0-2 years of experience in business/financial services)
- CFP® Candidate / Commitment to obtain CFP® Certification
- Bachelor's degree required
- Basic understanding of concepts in the areas of investments, personal financial planning, and income taxes
- Proficient in Microsoft Office Suite, including Excel
- Effective communication and time-management skills
- Able to perform several tasks concurrently, to prioritize work, and to take direction from multiple people
- Extraordinary client service attitude with a desire to develop long-term relationships with clients
- High standards of professionalism, ethics, and integrity, including the ability to maintain confidentiality in dealing with client matters

*SOUTHERN WEALTH MANAGEMENT LLP 5005 LBJ FREEWAY SUITE 920 DALLAS, TX 75244  
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**How to Apply**

If you are interested in the above position, please send a cover letter and resume to the following:

Mr. Michael A. Horlick  
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Dallas, TX 75244  
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