



Financial Advisor Job Posting

THE COMPANY

Colorado Capital Management is an independent, employee-owned, \$500 million RIA in Boulder, CO with a 20+ year history of growth and success. We utilize a DFA/Vanguard style investment approach, are financial planning centric and provide deep expertise in impact investing. As a Certified B Corporation, we are a values driven company deeply committed to corporate social responsibility.

THE OPPORTUNITY

This is the perfect opportunity for a financial advisor seeking meaningful work with a high-integrity, high-growth firm located in a very desirable market. It offers attractive compensation and benefits, substantial career upside, schedule flexibility, work/life balance, top-level mentoring, and equity participation.

JOB RESPONSIBILITIES

1. Establish close working relationships with clients and staff.
2. Prepare for and lead client meetings, either independently or in collaboration with other advisors.
3. Develop client financial plans, investment strategy and impact recommendations (in both public and private markets).
4. Advise on insurance, tax, and estate matters.
5. Document and follow up on key discussions and action items.
6. Coordinate with and delegate to internal and external professional resources.
7. Meet with new and prospective clients.
8. Lead company initiatives to continually raise the bar on client service and firm operations.
9. Contribute to the firm culture of social responsibility, cohesion, and growth.

PREFERRED QUALIFICATIONS

1. MBA and/or CFP or CFA designation, plus 3+ years of experience as a financial advisor.
2. Self-starter with a passion for delivering exceptional client-centered service.
3. Experience with high-net worth clients.
4. Strong analytical and communication skills.
5. Entrepreneurial spark and positive attitude. Interest in business development.

6. Familiarity with Wealth Box (CRM), Orion (reporting), Eclipse (trading), Money Guide Pro (planning) and Holistiplan (taxes).
7. Dedicated to making a positive lasting difference for our clients and the larger community.

TO APPLY

Send a resume and cover letter to jobs@coloradocap.com summarizing why you are the right person for this job, and why this position is the right opportunity for you. Please include your salary expectations. Your inquiry will be treated completely confidentially. Colorado Capital Management is committed to expanding the diversity of our firm.