BOCA WEALTH
ADVISORS

WEALTH MANAGEMENT ASSOCIATE

Boca Raton, FL – Full Time

FIRM OVERVIEW

Boca Wealth Advisors is a boutique, CPA-owned, fee-only wealth management practice based in Boca Raton, Florida. We manage over $350 million in assets across approximately 150 client relationships, delivering deeply personalized, tax-focused financial planning and investment services. Our team is known for a concierge-level, “like family” approach that sets us apart from larger firms.

THE OPPORTUNITY

This role is designed for an experienced CPA who is ready to transition from public accounting into a client-focused wealth management career—without the billable hour pressure, overtime demands, or business development expectations that define public firm life. There is no sales requirement in this role. As a Wealth Management Associate, you will collaborate directly with our senior advisors to develop and deliver comprehensive financial plans aligned with each client’s unique goals and values, with a particular emphasis on tax planning and strategy for high-net-worth individuals, estates, and trusts.

The career path progresses toward Senior Wealth Advisor and, for the right candidate, eventual partnership. Growth here is built on expertise and client service—not a sales quota. We are committed to investing in your professional, technical, and personal growth.

KEY RESPONSIBILITIES

CLIENT SERVICE & PLANNING

- Assist in client onboarding, with progressively independent participation in client meetings throughout your first year
- Prepare client paperwork, custodian documents, and account transfer materials
- Contribute to the preparation of comprehensive financial plans using MoneyGuide Pro
- Prepare income tax returns and contribute to year-round tax planning strategies for wealth management clients

TECHNOLOGY & OPERATIONS

- Develop proficiency in firm technology within your first year, including Redtail CRM, Schwab custodial platform, Porfolio Center and MoneyGuide Pro (training provided)
- Perform daily portfolio reconciliation and prepare monthly and quarterly investment reporting
- Assist with portfolio management tasks under senior advisor supervision
- Proficient in the Microsoft Office Suite, including Word, Excel, and PowerPoint, with the ability to produce polished, professional-quality documents, reports, and presentations

ADMINISTRATIVE & TEAM SUPPORT

- Support partners with administrative and operational tasks as needed
- Contribute to a collaborative, team-first culture with a positive, solutions-oriented attitude

WHO YOU ARE

- Exceptionally organized, with strong attention to detail and the ability to manage multiple priorities across advisors and clients simultaneously
- A responsive, clear communicator—both in writing and verbally
- Socially aware and open-minded, with genuine curiosity about diverse perspectives and a commitment to evidence-based thinking in both your professional work and your worldview
- Grounded in the highest ethical standards, with an unwavering commitment to the confidentiality of client and firm information
- Emotionally intelligent and self-aware, able to build effective relationships with a diverse team and client base
- Genuinely collaborative, you thrive in a team environment, welcome feedback and coaching, and put clients first
- Tech-savvy and adaptable, with the ability to quickly learn new platforms and tools
- Motivated to grow, you envision a long-term career in wealth management and want a firm that will invest in that vision
- A non-smoker

EDUCATION, EXPERIENCE & CREDENTIALS

- Bachelor's degree required; Master's degree preferred in Finance, Accounting, or a related field
- Two to five years of experience in public accounting or a tax-focused professional services environment, with meaningful exposure to high-net-worth individuals, estates, and/or trusts strongly preferred
- CPA designation required; CFP® certification is a plus, and we will fully support candidates who wish to pursue it
- Licenses and designations may be acquired on the job; we support your credentialing journey financially and with dedicated study time

COMPENSATION & BENEFITS

- Competitive base salary of $75,000–$125,000, commensurate with experience and credentials
- 100% employer-paid health insurance
- Employer-sponsored retirement plan
- Three weeks of paid vacation plus paid sick leave
- Full financial support for licensing exams, designation fees, continuing education, and professional development
- Semi-annual performance reviews with a clear path to advancement
- Ongoing coaching and mentoring from experienced partners

WORK ENVIRONMENT

Boca Wealth Advisors is an inclusive, welcoming workplace that celebrates diverse perspectives and backgrounds. We are a non-smoking firm. This is a Monday–Friday position with no overtime requirements and no billable hour targets—a meaningful distinction for CPAs accustomed to the demands of public accounting. Our office is located at 1515 S Federal Highway, Boca Raton, Florida.

HOW TO APPLY

Please submit your resume to Alexandra Demosthenes, alexandra@boca-wealth.com