



Associate Advisor

Reports to: Partner
Location: Bala Cynwyd, PA
Benefits: Yes
Status: Full-time, Exempt

About Us: Odyssey Capital Advisors (OCA) is a growing independent registered investment advisory firm located in Bala Cynwyd, Pennsylvania. We are an ensemble business focused on Investment Management, Business Consulting, and Financial Planning. Trust and transparency are at the heart of who we and what we do as we help our clients reach their professional and financial goals.

About the Role: Odyssey Capital Advisors is seeking an Associate Advisor. This role will be integral in assisting the Partner to manage client accounts. The ideal candidate is an individual who is highly collaborative yet has a strong independent work ethic. They are curious about the world around them and bring that knowledge and curiosity to client interactions. Candidates that fit into our culture will embrace technology, employ creativity, be solutions-oriented and hold in high regard serving clients in a fiduciary capacity. This role has tremendous growth potential and is an ideal fit for an early-career professional with aspirations to become a Senior Advisor. This position sits at the intersection of our financial planning and investment management functions.

The impact you can make:

- Ensure a positive client experience through timely response to all client correspondence and inquiries
 - Support Advisor in creating and ensuring accuracy in presentation materials, preparing for meetings, and following up with post-meeting deliverables
 - Service in-force policies for insurance applications
 - Manage client workflows using CRM system
 - Assist with New Business opportunities by managing referral activities
 - Monitoring and filtering inbound prospects
 - Supporting clients with new investment account openings and transferring assets from other financial institutions
 - Working directly with clients to collect key documents for investment and financial planning
 - Additional duties may entail participation in team projects and assisting with initiatives designed to streamline firm policies and procedures
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What excites you:

- Active listening and connecting easily with people to build trusted, lasting relationships
- Being extremely organized, with very high attention to detail and accuracy
- Passion for serving Clients and engaging in conversations that may not result in immediate tangible benefits
- Taking initiative and progressive thinking, prioritizing your own work, setting objectives, and completing time sensitive tasks
- Exemplifying very high professional standards, honesty, and integrity
- Utilizing technology to streamline client interactions



What you bring to OCA:

- Bachelor's degree from an accredited University
- CFP® or ChFC® designation or on track to obtain their CFP
- 3 years of financial planning or investment client-serving experience or demonstrated interest in this field
- Experience with Schwab Advisor Center and eMoney (preferred)

What OCA brings to you:

- Salary starting at \$55,000-65,000 based on experience and certifications
- Benefits include health care, vision; 401(k) plan with firm match, paid time off (PTO), professional development support, and volunteer time off
- Culture of recognition where employees acknowledge and reward great work of their colleagues

To apply:

- Submit your resume to recruiting@odysseyadvice.com

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