MERIDIAN
Financial Partners
Clarify the path. Enjoy the journey.

Position Description

Title: Support Advisor

Reports to: Senior Financial Advisor

Benefits: Yes

Status: Full time

About Meridian Financial Partners

Headquartered in Warrenton, Virginia, Meridian Financial Partners provides holistic financial solutions to individuals and organizations nationwide. The firm offers deep expertise and services in investment management, financial planning, and strategic integration of financial resources.

Meridian is one of the rare few that offers unique guidance and solutions to help clients create and manage a clear financial path to their life goals. The firm's partners have earned the unwavering trust of many long-term clients, who enjoy financial peace of mind as a result of the knowledge, customized care and—most especially clarity—that Meridian consistently delivers.

Position Overview

This is a salary plus benefits position focused on supporting the Advisory Team. The Support Advisor plays a key role in delivering the firm's promise of clarity, confidence, and unbiased guidance. We are looking for someone with the following skills and characteristics:

- Great problem solver
- Organized, detailed, and process-oriented
- Goal-oriented team player
- Likeable and connects easily with others
- Strong follow-through and responsiveness

About You

You are a detail-oriented, service-driven professional pursuing the CFP® designation and building a career as a financial advisor. You are organized, responsive, and take pride in supporting advisors and delivering an excellent client experience. You value professionalism, collaboration, and growth in a fiduciary, client-first environment.

Job Description and Responsibilities

The Support Advisor will support our Advisory team and have the following responsibilities:

- Support advisors and the investment team with client service, account administration and operational tasks
- Prepare and update client reports, financial data and documentation
- Maintain accurate records in CRM, portfolio management and custodial systems
- Communicate professionally with clients, custodians and internal team members
- Assist with the financial planning processes as needed
- Contribute to a high-quality, consistent client experience aligned with Meridian's fiduciary standards

Qualifications

- Bachelor's Degree
- 1-3 work experience
- Willingness to obtain Series 65 certification within one year

Salary and Benefits

- Competitive pay
- Team based incentive plan
- Medical and dental insurance benefits
- Retirement plan match
- Paid vacation