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US-MA-Boston

Senior Relationship Management Associate

WHO are we looking for? CAPTRUST is seeking a Senior Relationship Management Associate who will deliver high-level customer service to clients of the firm. The position is located in Boston, MA. The successful candidate will join an established wealth management advisory team, support...

**Category** Financial Advisor **Job Posted Date** 6 days ago **ID** 2023-1470 **# of Total Openings** 1**Workplace Type** Onsite

US-OH-Uniontown

Financial Planner

WHO are we looking for? CAPTRUST is seeking a dynamic Financial Planner who will deliver high-level customer service to clients to the firm. A competitive salary is offered for this role as well as expanding responsibilities with a rapidly growing firm. This opportunity is for our Green, OH offic...

**Category** Financial Planning **Job Posted Date** 7 days ago **ID** 2023-1468 **# of Total Openings** 2**Workplace Type** Onsite

US-AZ-Phoenix

Wealth Operations Associate II

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## Institutional Financial Advisor

WHO are we looking for? CAPTRUST is seeking Financial Advisors to serve and grow a \$1 million+ institutional consulting practice in multiple markets. The Financial Advisor role is responsible for building and servicing a practice of retirement plan clients including, qualified plan sponsor...

**Category** Financial Advisor    **Job Posted Date** 1 week ago    **ID** 2023-1463    **# of Total Openings** 1

**Workplace Type** Hybrid

US-TN-Brentwood

## Relationship Management Associate

WHO are we looking for? CAPTRUST is seeking a dynamic, energetic Wealth Relationship Management Associate who will deliver high-level customer service to clients of the firm. The successful candidate will join an established wealth management and institutional advisory team ...

**Category** Financial Advisor    **Job Posted Date** 2 weeks ago    **ID** 2023-1462    **# of Total Openings** 1

**Workplace Type** Onsite

US-FL-Lake Mary

## Wealth Client Management Associate

WHO are we looking for? CAPTRUST is seeking a Wealth Client Management Associate who will use specialized knowledge and skills, obtained through experience and/or formal training, to assist Client Management Consultants (CMCs) in providing excellent client service. The candidate for th...

**Category** Client Services    **Job Posted Date** 2 weeks ago    **ID** 2023-1461    **# of Total Openings** 1

**Workplace Type** Onsite

US-NY-New York

## Actuarial Associate

WHO are we looking for? CAPTRUST is seeking an Actuarial Associate who will work closely with Financial Advisors, client services professionals, and occasionally directly with firm clients to fund investment-related projects and deliverables for prospective and existing clients. The Actuari...

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(CMA II) who will support the Financial Advisor Service Team to service and retain institutional client relationships. These relationships may consist of corporate retirement plan investment committee...

**Category** Client Services **Job Posted Date** 3 weeks ago **ID** 2023-1456 **# of Total Openings** 1

**Workplace Type** Onsite

US-FL-Tampa | US-NC-Charlotte | US-NC-Raleigh

### Senior Institutional Client Management Consultant

CAPTRUST is seeking a Senior Institutional Client Management Consultant who will work with one to several financial advisors to service and retain institutional client relationships. These relationships may consist of corporate retirement plan investment committees, human resource c...

**Category** Client Services **Job Posted Date** 3 weeks ago **ID** 2023-1455 **# of Total Openings** 1

**Workplace Type** Onsite

US-KS-Wichita

### Administrative Associate

WHO are we looking for? CAPTRUST is seeking an Administrative Associate who will provide general office support with a variety of activities and related tasks. The Administrative Associate will be responsible for greeting office guests, answering incoming telephone calls, directing calls t...

**Category** Administrative/Clerical **Job Posted Date** 3 weeks ago **ID** 2023-1454

**# of Total Openings** 1 **Workplace Type** Onsite

US-NC-Raleigh

### Defined Contribution Associate

CAPTRUST is seeking a Defined Contribution Associate who will work with our Financial Advisors, client services professionals, and occasionally directly with firm clients to fulfill investment-related projects and deliverables for prospective and existing clients. The Defined Contribution Associa...

**Category** Retirement Planning **Job Posted Date** 3 weeks ago **ID** 2023-1453

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**Category** Client Services **Job Posted Date** 1 month ago **ID** 2023-1449 **# of Total Openings** 1

**Workplace Type** Onsite

US-NC-Raleigh

### Institutional Investment Research Associate

CAPTRUST is seeking an Institutional Investment Research Associate who will work with our Financial Advisors, Client Services professionals, Marketing colleagues, and occasionally directly with clients to scope/fulfill projects and deliverables for prospective and existing institution...

**Category** Investment Research **Job Posted Date** 1 month ago **ID** 2023-1447

**# of Total Openings** 2 **Workplace Type** Onsite

US-CA-Santa Barbara | US-CA-Riverside | US-CA-Roseville |  
US-CA-Sacramento | US-CA-Westlake Village | US-Remote  
| US-CA-Folsom

### Financial Advisor Retirement Counselor

WHO are we looking for? CAPTRUST is seeking a Financial Advisor Retirement Counselor who will be responsible for building and managing a holistic wealth management practice that serves the ongoing and ever-changing needs of its clients. They will provide deep financial planning advic...

**Category** Financial Advisor **Job Posted Date** 1 month ago **ID** 2023-1444 **# of Total Openings** 1

**Workplace Type** Remote, Hybrid

US-NJ-Warren | US-Any CAPTRUST Office

### Institutional Relationship Manager

WHO are we looking for? CAPTRUST is seeking a dynamic Institutional Relationship Manager who will provide high-level service to new and existing institutional investors and clients. A competitive salary is offered for this role as well as excellent career growth potential with an ever-growing firm

**Category** Financial Advisor **Job Posted Date** 2 months ago **ID** 2023-

**Workplace Type** Any CAPTRUST Location, Onsite, Remote

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**Workplace Type** Onsite

US-MO-Kansas City

Wealth Client Management Consultant

WHO are we looking for? CAPTRUST is seeking a Wealth Client Management Consultant to work with one to several financial advisors to service and cultivate relationships with wealth clients. The Client Management Consultant uses specialized knowledge and skills, obtained through experience...

**Category** Client Services    **Job Posted Date** 2 months ago    **ID** 2023-1439    **# of Total Openings** 1**Workplace Type** Onsite

US-TX-Austin

Administrative Associate

WHO are we looking for? CAPTRUST is seeking an Administrative Associate who will provide general office support with a variety of activities and related tasks. The Administrative Associate will be responsible for greeting office guests, answering incoming telephone calls, directing calls to...

**Category** Administrative/Clerical    **Job Posted Date** 3 weeks ago    **ID** 2023-1436**# of Total Openings** 1    **Workplace Type** Onsite

US-CA-San Ramon

Financial Advisor Relationship Manager

WHO are we looking for? CAPTRUST is seeking a dynamic, energetic Financial Advisor Relationship Manager who will deliver high-level customer service to clients to the firm. The successful candidate will join an established wealth management and institutional advisory team in providing...

**Category** Financial Advisor    **Job Posted Date** 2 months ago    **ID** 2023-1430    **# of Total Openings** 1**Workplace Type** Onsite

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US-NC-Raleigh

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US-GA-Stockbridge | US-GA-Peachtree City

### Wealth Relationship Manager

WHO are we looking for? CAPTRUST is seeking a dynamic, energetic Wealth Relationship Manager who will deliver high-level customer service to clients to the firm. The successful candidate will join an established wealth management and institutional advisory team providing independent advic...

**Category** Financial Planning    **Job Posted Date** 2 months ago    **ID** 2023-1428    **# of Total Openings** 1

**Workplace Type** Onsite

US-OK-Oklahoma City

### Client Service Specialist

WHO are we looking for? CAPTRUST is seeking a Client Service Specialist to work with one to several financial advisors to service and cultivate relationships with wealth clients. The Client Management Consultant uses specialized knowledge and skills, obtained through experience and/or form...

**Category** Client Services    **Job Posted Date** 2 months ago    **ID** 2023-1425    **# of Total Openings** 1

**Workplace Type** Onsite

US-IL-Chicago

### Administrative Professionals Team Lead

WHO are we looking for? CAPTRUST is seeking an Administrative Professionals Team Lead who will provide coaching and leadership for a team of regional and home office Administrative Professionals. This is a full-time permanent position working Monday through Thursday from 8:30...

**Category** Administrative/Clerical    **Job Posted Date** 3 months ago    **ID** 2023-1422

**# of Total Openings** 1    **Workplace Type** Onsite

US-OH-Akron

### Institutional Relationship Manager

WHO are we looking for? CAPTRUST seeks an Institutional Relationship Manager who will provide

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WHO are we looking for? CAPTRUST is seeking a Tax Manager who will work with team members to provide high-net-worth families, individuals, and their related entities with tax compliance, tax consulting, and wealth management services. The Tax Manager is responsible for adding to th...

**Category** Tax **Job Posted Date** 4 months ago **ID** 2023-1403 **# of Total Openings** 1

**Workplace Type** Any CAPTRUST Location

US-PA-Allentown

### Wealth Planning Specialist

WHO are we looking for? CAPTRUST is seeking a Wealth Planning Specialist with a passion for working as part of a team to solve complex financial challenges for Ultra-High Net Worth clients greater than \$25 million net worth. The ideal candidate will be looking to take their career to th...

**Category** Wealth Management **Job Posted Date** 1 week ago **ID** 2023-1401 **# of Total Openings** 1

**Workplace Type** Onsite, Hybrid

US-PA-Greensburg | US-PA-Pittsburgh

### Client Services Specialist

WHO are we looking for? CAPTRUST is seeking a Client Services Specialist who will work with one to several financial advisors to service and retain wealth client relationships. The Client Management Consultant uses specialized knowledge and skills, obtained through experience and/or form...

**Category** Client Services **Job Posted Date** 2 months ago **ID** 2023-1398 **# of Total Openings** 1

**Workplace Type** Onsite

US-NC-Greensboro

### Financial Planner

WHO are we looking for? CAPTRUST is seeking a Financial Planner who will deliver high level customer service to clients to the firm. A competitive salary is offered for this position with expanding responsibilities with a rapidly growing firm. Primary responsibilities may include th...

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Consultant uses specialized knowledge and skills, obtained through experience and/or form...

**Category** Client Services **Job Posted Date** 3 months ago **ID** 2023-1358 **# of Total Openings** 3

**Workplace Type** Onsite

US-Any CAPTRUST Office

### National Tax Manager

WHO are we looking for? CAPTRUST is seeking a National Tax Manager who will work with team members to provide high-net-worth families, individuals, and their related entities with tax compliance, tax consulting, and wealth management services. The Tax Manager is responsible for...

**Category** Tax **Job Posted Date** 6 months ago **ID** 2023-1354 **# of Total Openings** 1

**Workplace Type** Any CAPTRUST Location, Remote

US-MN-Wayzata

### Tax Associate

WHO are we looking for? CAPTRUST is seeking a Tax Associate who will provide administrative, tax compliance, and fiduciary support. The Tax Associate's primary responsibility is to coordinate and participate in client services within a team concept.

**Category** Tax **Job Posted Date** 6 months ago **ID** 2023-1352 **# of Total Openings** 1

**Workplace Type** Onsite

US-MI-Grand Rapids | US-CA-Santa Barbara | US-CA-San Ramon | US-FL-Tampa | US-GA-Atlanta | US-AL-Homewood | US-NC-Raleigh | US-MA-Boston | US-NY-New York | US-CA-Los Angeles | US-AL-Montgomery...

### Wealth Financial Advisor

WHO are we looking for? CAPTRUST is seeking Wealth Financial Advisors who will attract new affluent wealth clients to the firm using a comprehensive financial planning approach. A successful candidate will join an established wealth management advisory firm...

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The Project Manager will be responsible for driving business requirements and facilitatir...

**Category** Project Management **Job Posted Date** 6 months ago **ID** 2022-1316

**# of Total Openings** 1 **Workplace Type** Onsite

US-IL-Chicago | US-OH-West Chester | US-MA-Boston | US-TX-Dallas | US-MN-Minneapolis | US-TN-Nashville | US-NY-New York | US-CA-San Diego | US-CA-Los Angeles | US-Washington, DC

### Institutional Financial Advisor

WHO are we looking for? CAPTRUST is seeking Institutional Financial Advisors to serve and grow a \$1 million+ institutional consulting practice in multiple markets. The Financial Advisor role is responsible for building and servicing a practice of retirement plan clients including, qualified pla...

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