

## FINANCIAL SUPPORT ASSOCIATE



PITON WEALTH  
490 Cascade Loop, Ste. A  
Kalispell, MT 59901  
(406) 756-7797  
pitonwealth.com

Piton Wealth specializes in financial planning and investment management. We are now accepting application for this position. Interviews will continue until the position is filled.

### JOB OVERVIEW

The Financial Support Associate is a key client-facing presence in our front office and provides support to all the members of the practice. All Piton team members are committed to future growth and collectively serving our clients with the utmost professionalism.

### RESPONSIBILITIES

- Key office management responsibilities to keep office running smoothly and efficiently
- Responsible for budget, ordering and stocking office supplies
- Supports Piton team members with administrative tasks
- Delegates appropriate client service requests to advisors and wealth planners
- Updates client financial statements and files
- Executes all basic appointment preparation for client meetings
- Executes general client service processes and requests
- Marketing and social media lead in coordination with Montana Event Planning Coordinator
- Executes assigned workflows in partnership and coordination with broad Piton service team

### REQUIREMENTS

- Undergraduate degree by May 2026
- Proficient in Microsoft Office components and good with technology
- Deep roots and extensive relationships in Montana and preferably the Flathead Valley
- High energy and tremendous follow up, highly organized and self-motivated

APPLY on Handshake or submit cover letter & resume to [team@pitonwealth.com](mailto:team@pitonwealth.com).