



Company Overview

CORDA Investment Management, LLC is a client-centered wealth management firm serving high-net-worth individuals and families. We bring together investment management, financial planning, and tax strategy in one integrated, proactive approach.

Registered with the SEC under the Investment Advisers Act of 1940, CORDA upholds the highest standards of integrity and fiduciary responsibility.

At CORDA, our team shares a common purpose: helping clients navigate complexity, build confidence in their financial future, and leave a meaningful legacy. We are a close-knit, collaborative team. We support each other and welcome new ideas, while staying focused on the clients we serve. If our work resonates with you, we'd love to connect!

Financial Advisor

The Financial Advisor will work directly with high-net-worth clients in a collaborative, team-based environment. This role is focused on building and maintaining trusted client relationships, delivering thoughtful investment guidance, and contributing to the firm's long-term growth.

Advisors partner closely with portfolio management, financial planning, and operations teams to provide an integrated wealth management experience. While the firm benefits from a strong referral network, this role also requires a proactive approach to relationship development and organic growth.

Location (Hybrid, 3 days in office): Austin, Dallas, or Houston

Job Type: Full-Time

Essential Duties & Responsibilities

- Serve as a primary point of contact for client relationships, delivering a high-touch, client-first experience
- Develop a deep understanding of each client's financial goals, risk tolerance, and long-term objectives
- Provide ongoing investment guidance, portfolio reviews, and recommendations in partnership with internal teams

- Collaborate with financial planners, portfolio managers, and operations to deliver comprehensive wealth management solutions
- Maintain and strengthen existing client relationships, with a focus on long-term retention and trust
- Identify opportunities to deepen relationships through additional services and referrals
- Participate in client meetings, reviews, and ongoing communication throughout the year
- Maintain accurate client records, notes, and follow-ups within CRM systems
- Stay current on market trends and industry developments

Education & Experience

- Series 65 or Series 7 and Series 66 combination
- 2+ years of relevant experience, including:
 - Registered representative at a full-service broker-dealer, or
 - Investment/portfolio management experience
- Proficiency with Microsoft Office Suite
- Experience with Salesforce a plus

This job description should not be considered all-inclusive. It is merely a guide of expected duties. The employee understands that the job description is neither complete nor permanent and may be modified at any time. At the request of their supervisor, an employee may be asked to perform additional duties or take on additional responsibilities without notice.