

# Secure Today Ready for Tomorrow

Echo Wealth Management



## Meet Echo Huang Founder and President

For Echo Huang, CFA, CFP®, CPA building wealth isn't just about managing money, it's about building a life of freedom and opportunity. And that's exactly the philosophy she brings to her growing team at Echo Wealth Management.



*As a boutique firm, Echo Wealth Management offers more than just a job. Here, you'll find a purpose-driven workplace where your voice matters, your ideas are valued, and your growth is a priority.*

— Echo Huang  
Echo Wealth Management



### A Culture of Innovation and Impact

Echo Wealth Management isn't a place where you get lost in corporate bureaucracy. As part of a small but mighty team, you'll have the opportunity to make an impact every day—whether you're refining client experiences, shaping new strategies, or rethinking how wealth management can be done.

***"I tell my team: don't just follow the roadmap—help create it," Echo says. "We're building a future, together."***

This forward-thinking culture comes with high standards but also unmatched support. Employees enjoy mentorship from Echo and seasoned professionals, access to cutting-edge tools, and a culture of collaboration that ensures everyone can do their best work.

### Your Growth Matters

At Echo Wealth Management, we're committed to your professional and personal growth.

Team members can take advantage of:

- Advanced Certifications: Support for earning your CFP®, CFA, or other designations.
- Mentorship Opportunities: Learn directly from Echo and other senior team members.
- Career Pathing: Opportunities to lead projects, develop client relationships, and shape firm strategy.
- Cutting-Edge Technology: Leverage tools like the Echo Dashboard to innovate and streamline.

***"We invest in our people, because they are the heart of our success," Echo says.***



*We empower clients, support one another, and embrace innovation. If you're ready to join a firm that values your voice and your growth, we're ready to meet you. Together, let's build a future worth owning.*

*— Echo*



## Who We're Looking For

If you're a financial professional who thrives in an entrepreneurial environment and shares our passion for transforming lives, we want to meet you.

### Ideal candidates:

- Have a growth mindset and are curious, adaptable, and proactive.
- Value collaboration and want to make a meaningful impact in a boutique, client-focused setting.
- Are driven by more than just numbers—they're inspired by making a difference in people's lives.

"This isn't a place for box-checkers or those looking for the easy path," Echo says with a smile. "But if you're someone who's ready to bring ideas, work hard, and grow with us, I'd love to talk."

## Ready to Build the Future?

Employees at Echo Wealth Management aren't just fulfilling job descriptions—they're shaping the future of the firm.

Whether they're diving into investment strategy, refining client experiences, or bringing new ideas to the table, team members have the chance to take ownership of their work.

"I want people who are curious, ambitious, and adaptable," Echo says. "This industry is constantly evolving, and the best professionals are the ones who aren't afraid to ask questions, explore new ideas, and find innovative ways to serve our clients."

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Echo Wealth Management is hiring. Reach out today to learn more.



WEALTH  
MANAGEMENT