Experienced Wealth Manger/Financial Planner

Job Summary

Location
    Jacksonville, FL
Industries
    Registered Investment Advisor, Fee-only financial planning
Job Type
    Full Time
    Employee
Years of Experience
    5+ Years experience
Education Level
    Bachelor's Degree
Salary
    Competitive based on industry standards and experience, including comprehensive fringe benefits, 401K plan match, discretionary bonus

About the Firm

Firm Description:
Our firm is a fee-only, independent RIA, registered with the SEC, providing comprehensive wealth management, financial planning and investment management services to a range of clients including high-net worth individuals, families, trusts and foundations. We do not sell financial products and are affiliated with a regional CPA firm based in Jacksonville, Florida

Job Summary

Brief Description: Seeking a highly capable, hard working, experienced wealth manager or financial planner to work closely with clients. The position has responsibility for managing existing client relationships, formulating and implementing investment and financial planning advice, and developing new client relationships. Our firm offers its people the opportunity to work in a professional and challenging environment. The scope of our work is varied and complex, and requires a strong commitment to client service and is very much based on working closely with people from all areas of the organization, as part of a team. We are affiliated with a regional CPA firm and work closely with the tax professionals of the CPA firm in providing holistic financial and wealth management services

Duties and Responsibilities:
- Work closely with clients to address all of their financial planning concerns (i.e. income and estate, investments, general planning, product evaluation, risk planning) functioning as the clients personal CFO
- Develop and maintain relationships with new and existing clients
- Expand client relationships including working with multi client generations
- Identify opportunities to expand client relationships and related investment asset management
- Networking with centers of influence to build referral base
- Provide comprehensive financial planning services and investment advice to clients

- Design and implement client portfolios consistent with firm philosophy
- Prepare personal financial plans and present same to clients
- Conduct portfolio reviews, lead client and prospect meetings
- Conduct firm ad hoc research projects, including financial planning and investment research projects
- Master the firms CRM database and projects related to it
- Work with the CPA firm tax staff on behalf of the wealth management clients for holistic planning
- Participate on the Firm's Investment Committee

Qualifications:

Required-

- Bachelors degree
- 5+ years of professional experience in RIA wealth management/financial planning services
- CFP certification
- Strong verbal/written communication skills with ability to simplify difficult financial concepts
- Reliable, self-directed and goal-oriented
- Strong interpersonal skills
- Excellent organizational skills, detail oriented
- Experience in working within a team environment
- Excellent client service skills; client first attitude
- Highly skilled in Microsoft Office Products (Word, Excel, PowerPoint, Adobe and Outlook)

Desirable-

- CPA designation
- Proficient and experienced with Morningstar Advisor Workstation
- Familiarity with Schwab Institutional platform
- Existing relationships with centers of influence
- Familiarity with Junxure or similar CRM system
- Familiarity with eMoney

Salary and Benefits:

- Competitive based on industry standards and experience
- Benefits include firm payment of substantially all of the medical and dental premiums for employee coverage.
- Vision insurance
- Firm paid group life insurance based on compensation
- Group long term disability insurance with premiums paid by the firm
- 401(k) plan with company match
- Generous vacation and sick leave policy that start on the first day of employment
- Discretionary bonus
- Full financial support for professional/continuing education requirements

Qualified candidates please send resume to: projobsjax@yahoo.com with contact information where you can be reached.