True Wealth Design | 700 Ghent Road, Akron, OH 44333 | www.TrueWealthDesign.com
Email cover letter and resume to Stacey Stuchal sstuchal@truewealthdesign.com with subject line "Wealth Advisor"

Wealth Advisor Job Description

True Wealth Design (TWD) is a growing wealth management firm in Akron, OH. TWD was created to make a substantial positive difference in our clients' lives, our employees' lives, and the communities where we live and work. The means by which we strive to do this is by delivering sound financial advice in a transparent, client-friendly manner. With our uncommon and deep expertise in retirement, tax, and investment planning, we provide complete integration of our client's financial life.

We are a seeking a Wealth Advisor for our small but expanding team. This is not an entry-level position but is an ideal opportunity for a <u>highly intelligent CFP® with a minimum of 5+ years of true financial planning experience</u> (not just experience in an investment or insurance sales environment). If you feel trapped by a lack of upward mobility in your current situation, we want to talk to you. This is planning-centric position that is directly responsible for successful client relationship management. The position does not require outside-sales-type business development but does require inside-sales success in converting client referrals and other prospective clients that are a good fit for TWD's wealth management services.

Candidates that fit into our firm and culture will desire to be in a non-commissioned, small-firm, intellectual environment and have a true passion for financial planning as their career calling. We are not too formal, like to have fun, and care about our clients. We work hard, get things done on time, have high expectations of all team members, and pay close attention to details. We only want exceptional people on our team and will provide excellent compensation and rewards in return for superior performance. A path to partnership for those that contribute to the equity of the firm is also available.

Position Overview

This is an advisory position that will be responsible for leading client relationships and may provide support in managing the firm's most complex client relationships. It is expected that after a 6-12 month integration phase to learn the firm's processes and technology that you will begin to lead new client relationships. Existing client relationships may also be transferred to you over a 1-3 year transition period.

You will have administrative support from Client Service Administrators and professional support from a Wealth Analyst in our team service model. Investment management functions are centralized. You will need to be able to match clients to the appropriate model portfolio and be able to clearly communicate our investment philosophy and results to clients.

Above average math and computer skills are essential with the ability to quickly learn new software. Strong knowledge of cash flow management, asset allocation, and retirement planning is expected. Tax planning is a core service we provide, and if needed, we can train the right candidate. Debt financing, estate, and insurance knowledge is needed but can also be trained.

<u>You must have the ability to utilize critical thinking skills</u>, work independently, and be solely responsible for successful management of your client relationships. Training less experienced advisors will also be required.

Initial Key Areas of Responsibility:

- Effectively deliver advice to new and existing clients and earn their trust and respect
- Be solely responsible for successful client relationship management
- Perform effective public speaking in presenting educational content on retirement planning to small groups
- Successfully convert prospective clients into new clients
- Collect, organize, and synthesize information with accuracy in conjunction with firm processes

- Construct financial and tax projections using Money Guide Pro, Morningstar, and BNA Tax Planning
- Review and/or create deliverables for client meetings
- Execute delivery of TWD's investment management philosophy
- Responsible for follow-through on post-meeting tasks
- Accurately maintain client records in our CRM and Net Documents document management software
- Field ad hoc planning questions from clients, interacting professionally and respectfully in all communications

Key Qualifications:

- CFP® certification required
- B.A. or B.S. degree from accredited four-year university required
- Minimum of 5+ years in financial planning / wealth management environment (preferably RIA); CPA with income tax experience looking to make career change also considered
- Extroverted, optimistic personality required
- Highly organized with strong attention to detail
- Strong financial and analytical skills
- Strong active listening and communication skills (verbal and written)
- Strong persuasive and interpersonal skills
- Comfortable with and effective in speaking to small groups
- Able to work independently with a 'no job is beneath me' attitude
- Series 65 license or attainment within 6-12 months after hire date
- Above average knowledge of Microsoft Office suite, especially Excel
- Experience with Money Guide Pro, Morningstar, Tamarac, BNA Tax Planning, Net Documents, and/or NETX360 is a plus

Benefits:

- Mentorship and learning opportunities from some of the industry's leading wealth managers
- Administrative and professional support in team service model
- Career track to clearly communicate requirements for professional advancement, including path to partnership
- Highly competitive base salary with incentive pay program
- Company subsidized health, dental, and disability insurance
- 401k plan with company match
- Educational reimbursement (continued education, conference attendance, training, etc.)
- Paid professional dues

Keywords: Financial Advisor, Wealth Management, CFP, CPA
Compensation Range: $75,000 - $125,000

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