

Wealth Analyst Job Description

True Wealth Design (TWD) is a growing wealth management firm in Akron, OH (near Summit Mall). 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 holistic 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 seeking a Wealth Analyst for our expanding team. This is an ideal opportunity for a highly intelligent financial planner generally with 2 to 7 years of experience or a CPA wanting to make a career change. Candidate will be self-motivated and excited to learn wealth management from TWD's Wealth Advisors while making substantial contributions to our firm and clientele in a supportive role. This is a planning-centric position and is not a sales position.

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.

Position Overview

This is an advisory position that will support the firm's Wealth Advisors in managing existing and new client relationships. You will be expected to provide support for various projects related to delivering wealth management services to our clients. This will include but is not limited to analyzing and summarizing cash flow, preparing financial plans and tax projections, and performing basic investment analysis using various technologies and processes.

Above average math and computer skills are essential with the ability to quickly learn new software. A working knowledge of asset allocation and retirement planning is expected. Wealth Advisors are available to provide mentoring and direction, but you must have the ability to utilize critical thinking skills, work independently, and anticipate firm and client needs.

Initial Key Areas of Responsibility:

- Collect, organize, and synthesize information with accuracy in conjunction with firm processes
- Construct basic financial and tax projections using Money Guide Pro, Morningstar and BNA Tax Planning
- Create drafts of deliverables for client engagements for review by Wealth Advisor
- Involvement in client meetings whenever possible
- Accurately identify, document, and follow through on post-meeting tasks
- Interact with clients over via email, phone, and in-person professionally and respectfully
- Properly maintain client records in our CRM and Net Documents document management software
- May assist with account management, reporting, and trading/rebalancing of accounts via Tamarac software.

Key Qualifications:

- Combined ACT score of 23 or greater; or combined SAT score of 1150 or greater strongly preferred
- B.A. or B.S. four-year degree from accredited CFP Board registered financial planning program strongly preferred
- 2+ years in financial planning / wealth management preferred; career change for early-career CPA also considered
- CFP® certification or attainment within 3 years from hire date
- Position requires a bright, hard-working, self-motivated, and personable individual.

- Must excel at highly detail-oriented work and be able to follow-through on assigned tasks and responsibilities
- Able to work independently with a 'no job is beneath me' attitude
- 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
- Career track to clearly communicate requirements for professional advancement
- 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