To apply for this position please submit information to Caleb Brown at cbrown@newplannerrecruiting.com or www.newplannerrecruiting.com

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Wealth Manager Job Description

Nationally recognized Edina, MN based fee-only wealth management company seeking a Wealth Manager for our growing team. We provide comprehensive, holistic financial life planning services for high net worth individuals and families. We use a unique approach to assist clients in articulating meaningful goals and attaining those goals through actions and strategies consistent with their specified values. We provide a highly customized and very personal suite of services. If you have an accounting and/or tax background and want to transition into wealth management, we are interested in you.

Position Overview

This is a professional position that will assist Lead Wealth Managers in the creation of complex and comprehensive financial projections for high net worth clientele. This position will be involved in the entire client engagement and can grow into the Lead Wealth Manager role. The Lead Wealth Managers are available to provide mentoring and big picture direction, but you must have the ability to utilize critical thinking skills, work independently and anticipate firm needs and client questions. This is a technical planning centric position within the Wealth Management Department. Additionally, this is not a sales position and generating new business is not a requirement for this position.

Initial Key Areas of Responsibilities:

- Collect, organize, and synthesize personal and financial client information
- Construct financial and tax projections using Salentica CRM/Microsoft Dynamics, Naviplan and CSPlanner
- Assist Lead Wealth Managers in analysis of estate plans, retirement plans, and insurance needs
- Participate in client meetings and support Lead Wealth Managers in capturing client wishes via meeting notes and delivering planning strategies
- Create deliverables for client engagements
- Coordinate planning recommendations implementation with outside professionals
- Continuously monitor clients' financial situations with detail and accuracy with Salentica CRM
- Be available to field ad hoc planning questions from clients
- Conduct research projects on recent developments in the wealth management industry

Key Qualifications:

- B.A. or B.S. degree from accredited four year university
- CPA and desire to obtain CFP® certification within 1- 2 years after hire date
- 2+ years of experience in the tax and/or accounting field
- Strong financial and analytical skills
- Strong verbal and written communication skills
- Strong persuasive and interpersonal skills
- Ability to identify, meet and follow through with client needs and requirements
- Must be a self-starter, problem solver and a goal-oriented team player with a 'no job is beneath me' attitude
- Able to work independently
- Organized, with a strong attention to detail
- Able to perform multiple tasks at one time efficiently
- Show confidence when dealing with clients and the firm owners
- Knowledge of Microsoft Office suite. Experience with Naviplan, CSPlanner, and Portfoliocenter, and iRebal a plus

Benefits:

- Qualifies for new CFP Board 2 year Apprenticeship work experience requirement
- Collaborative work environment with a strong team focus
- Competitive salary with performance based pay program and career track available
- Employer paid health insurance
- 401k with employer match
- Educational reimbursement (continued education, conference attendance, training budget, etc.)
- Paid professional dues
- Mentorship and Learning Opportunities