

Lead Wealth Planner, CFP

Job description

CFP REQUIRED - APPLICANTS WITHOUT A CFP WILL BE AUTOMATICALLY REJECTED

Come join one of the fastest growing RIAs in the industry. At Wedmont we are changing the way successful families receive financial advice. Wedmont's flat fee model is disrupting the wealth management industry, and we are hiring a wealth planner to be our clients' trusted advisor across all topics related to investments and financial planning. A candidate should be an effective communicator with significant experience in client-facing financial planning. If you're analytical, meticulous, client-aligned, and want to work for an innovative, mission-oriented firm, we'd like to meet you.

In this role you will:

- Gain a deep understanding of our clients' unique needs and aspirations to confidently advise them on their financial goals
- Help craft custom investment portfolios using Wedmont's index-based investment philosophy
- Be responsible for maintaining a book of business
- Build and deepen your knowledge and skillset by maintaining an in-depth understanding of financial planning and the investment markets
- Continue to develop and refine your craft of financial planning
- Be an active part of a collaborative team

Responsibilities:

- Analyze clients' financial situations (e.g. balance sheets, income, and expenses)
- Examine and identify financial planning opportunities (e.g. investments, tax, T&E, risk management, etc.)
- Develop sound financial plans for clients
- Customize financial plans according to clients' changing needs
- Help clients implement their plans and execute transactions
- Assist in sales presentations to prospective clients
- Build strong relationships to retain existing clients
- Maintain updated knowledge of regulations, best practices, and financial products

Skills:

- CFP required
- Minimum five years client-facing experience, preference for more tenured professional
- Excellent communication skills - both written and verbal
- Exceptional investment acumen and knowledge of broad range of planning topics
- Ability to analyze financial information and comply with regulations
- Strong ethics, with a customer-oriented attitude
- Ability to foster long-term client relationships

- Experience with Charles Schwab, Orion, Salesforce, and Right Capital is a plus

Compensation:

- This is a fully remote position with the ability to work anywhere within the continental US
- We have a highly competitive salary, bonus, and benefit plan
- Starting salary is dependent on experience but cash compensation will exceed \$200,000 within 24 months of onboarding
- Our employees experience significant increases in compensation and responsibility

Equal Employment Opportunity

It is the policy of Wedmont Private Capital, LLC to ensure equal employment opportunity (EEO) for all employees and applicants for employment without regard to race, color, religion, sex, pregnancy (including childbirth, lactation, or related conditions), national origin or ancestry, age, disability, veteran status, uniformed servicemember status, sexual orientation, gender identity, status as a parent, genetic information (including testing and characteristics), or any other characteristic protected by applicable federal, state, or local law. It is Wedmont's policy to comply with applicable laws concerning the employment of persons with disabilities, including reasonable accommodation for applicants and employees with disabilities.