VANCE WEALTH

JOB DESCRIPTION FOR THE POSITION OF:

Wealth Advisor

Who We Are:

Since 2003, Vance Wealth has served as a premier financial planning practice passionately committed to helping our families and businesses succeed at every step of their financial journey. It's a commitment that starts with carefully listening to their goals and making their priorities our own. We aim to take care of clients like family, working tirelessly to establish a blueprint for today with a vision of tomorrow, and helping provide the confidence they need to make your dreams a reality.

We pride ourselves on our client care philosophy. Vance Wealth will be by our client's side through all of life's challenges, guiding them through the most difficult of times and empowering you during the best of times. Whether advising on our client's everyday spending, retirement planning, investments, tax strategies, insurance, college savings or any other financial need, we're committed to providing them the confidence and knowledge needed to be prepared for life's uncertainties.

Providing client-centric solutions, backed by years of financial planning expertise, is not an accident. In an ever-changing world and a constantly evolving economy, we are always seeking ways to stay abreast through continuing education opportunities in the financial industry, the markets, and specific investments. What's more, we have a strong presence in our community providing education to both the public and professionals alike, through seminars, workshops, and other speaking engagements. It's a responsibility we passionately embrace every day. It means paying our experience forward at every opportunity and providing clarity when it's needed the most.

Position Summary:

This is not a sales role.

The position of Wealth Advisor is a client-driven position highly involved in all steps of the financial planning process.

Responsibilities:

- Prepare thoughtful, customized comprehensive financial plans and portfolios by conducting research and analysis of potential client solutions and recommend strategies to clients to achieve their financial goals and objectives.
- Effectively work with your team and available resources in support of our clients; executing client requests, updating information, follow up on open items
- Critical in supporting, retaining, and building meaningful client relationships
- Serve the client's best interests, providing outstanding financial advice guidance
- Effectively evaluate client situations and analyze their needs

Path to future equity:

Business Development -Community involvement

- Fostering new relationships with center of influence (COI's) and improving relationships with current COI's
- Generate new business and move prospects through our private client and business owner sales process
- Focus on lead generation and new client engagement.
- Participate in the sales process in partnership with team to build new client relationships
- Develop and maintain relationships with tax and estate planning professionals

We are looking for an experienced Wealth Advisor with a consistent track record of effectively serving clients and helping our clients achieve their financial goals. If you can effectively evaluate client situations, analyze their needs, develop, and present a compelling set of recommendations, and build effective relationships, this may be the opportunity for you!

We have found that our ideal advisor candidate is an investment professional in one of the following positions:

- A member of an existing RIA firm
- An advisor at a wire house interested in making the transition to a fee-based RIA business
- An investment professional in another field such as insurance or annuities
- Holds a CFP designation or is actively pursuing one
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If you believe you would be a good match, we invite you apply today.