Position: Senior Financial Advisor
Location: Sandy Springs Area
Hybrid: Four days in office/One day WFH

Firm Overview:

This is a nationally recognized, employee-owned, independent RIA with more than $25B in assets under management. The firm delivers a planning-first advisory model that integrates tax, estate, retirement, and investment strategies for clients. Advisors benefit from an ensemble structure with strong centralized planning, investment research, and operational support. The culture is fiduciary-driven, transparent, and focused on professional growth. The Atlanta office offers a boutique client experience backed by the scale and stability of a top national platform. Bringing a book of business is not required (however, you can).

Position Overview:

Seeking an experienced Senior Financial Advisor who has demonstrated success building and expanding a book of business through disciplined business development and trusted client relationships. In this role, you will serve as the primary relationship owner, leading planning-first conversations with high-net-worth clients and engaging them around their financial vision, values, and goals. You will drive growth through both self-sourced opportunities and firm-provided leads while operating within a fully leveraged advisory model. You will be supported by a dedicated team, in-house specialists, centralized investment management, and structured transition support designed to protect and grow your client relationships.

This comes with equipping you with a comprehensive suite of integrated resources - including an accounting firm, law firm, expanded high-net-worth investment capabilities, and a centralized financial planning team - so you can deliver deeper, more coordinated value to your clients. This opportunity is designed for advisors - whether from a wire house, independent RIA, or solo practice - who want ownership, scale, and a long runway within a majority employee member-owned firm investing heavily in organic growth, technology, and long-term equity participation.

Responsibilities:

Client Leadership:

- Serve as primary advisor and strategic quarterback for high-net-worth individuals and families
- Lead planning-first conversations centered on vision, values, and long-term goals
- Delivering advice consistently with firm guidelines
- Coordinate integrated advice with tax, estate, planning, and investment specialists
- Leverage evolving technology and AI capabilities to deliver personalized, data-informed planning and client insights

Growth & Business Development:

- Contribute meaningfully to firm-level organic growth targets through consistent net new revenue generation
- Generate new revenue through personal networks, referral relationships, and firm generated leads
- Expand wallet share across investments, tax, estate, and consulting services
- Identify and activate cross-disciplinary opportunities across tax, estate, and consulting to deepen client relationships and expand enterprise value

- Execute a disciplined business development plan with measurable revenue contribution
- Partner with leadership and growth teams to build and execute a 12–24 month scale plan aligned to meaningful production milestones
- Consistently attract target clients (typically $1M+ investable assets)

Built-In Leverage advisors operate within a fully supported team structure:

- Dedicated Client Service Associate (CSA)
- Associate Advisor support
- In-house tax, estate, planning, and investment specialists
- Centralized portfolio management
- Marketing engine and digital campaign support
- Structured onboarding transition support for breakaway advisors
- A national brand, integrated service model, and enterprise infrastructure designed to support advisors scaling beyond what a standalone practice can efficiently achieve

You focus on relationships and growth. The firm provides the infrastructure.

A Strategic Career Move — Without Starting Over

For experienced advisors, making a move is never about starting from scratch. It is about elevating your platform, protecting what you've built, and accelerating what comes next. The firm provides structured transition guidance, including compliance and legal coordination support, client communication planning, and operational onboarding designed to reduce friction and protect momentum.

Our goal is to help you transition thoughtfully and begin operating at scale from day one. With an established national brand, integrated tax and estate capabilities, centralized investment management, and a dedicated growth infrastructure.

What We're Looking For:

- 5–10+ years of experience in wealth management or advisory roles
- Demonstrated success building and managing a book of business
- Strong financial planning acumen and client leadership skills
- CFP® certification preferred (or willingness to obtain within two years)
- Clean U4 (if registered)
- Entrepreneurial mindset with a long-term orientation
- Desire to build equity within a collaborative, majority employee-owned firm

Why Advisors Choose:

- Freedom to act as a true fiduciary
- Equity participation and long-term wealth creation
- A collaborative, non-siloed culture
- Deep technical bench across tax, estate, and investments
- Commitment to building enduring careers — not short-term production
- A growth-focused firm building enterprise value for the next generation

All interested candidates, please candidate Shari Cown at shari@scconsultingsvcs.com