Position: Senior Financial Advisor
Location: Oklahoma City

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.

The Oklahoma City office has a close-knit feel, with approximately 20–25 employees, including 5–6 advisors, support staff, tax professionals, and local leadership. 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.

This is a full-time, high-priority opportunity supporting the transition and future growth of high-net-worth client relationships within the Oklahoma City office. Bringing a book of business is not required, although advisors are welcome to bring one if they choose.

Position Overview

Seeking an experienced Senior Financial Advisor with demonstrated success in 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 for high-net-worth individuals and families, leading planning-first conversations around their financial vision, values, and goals. You will be responsible for maintaining and deepening existing client relationships while identifying opportunities to grow the business over time.

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 opportunity provides 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 wirehouse, 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.

The ideal candidate is relationship-driven and growth-oriented, with a demonstrated ability to balance exceptional client service with proactive business development. This is not an investment-strategy-only role; success requires strong relationship leadership, client development, and a genuine desire to grow a business over time.

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
- Maintain and deepen existing client relationships while identifying opportunities to expand the firm's relationship with clients
- Deliver advice consistently with firm guidelines and fiduciary standards
- 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 investment, 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 with $1M+ in investable assets

Built-In Leverage

Advisors operate within a fully supported team structure, including:

- 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 and transition support for breakaway advisors
- 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, 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 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
- Proven ability to maintain and grow high-net-worth client relationships
- Strong financial planning acumen and client leadership skills
- Demonstrated business development orientation and a willingness to proactively pursue new opportunities
- Ability to balance exceptional client service with measurable business growth
- 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

The strongest candidates will be relationship-oriented advisors who enjoy developing clients and growing a business. Candidates whose experience is primarily service-focused, with limited business-development responsibility, or whose strengths are predominantly centered on investment strategy rather than client relationships and growth, may not be the best fit for this opportunity.

Why Advisors Choose This Opportunity

- Freedom to act as a true fiduciary
- Equity participation and long-term wealth creation
- Collaborative, non-siloed culture
- Deep technical bench across tax, estate, and investments
- Significant local office support within a close-knit team environment
- Established platform and resources without requiring advisors to bring a book of business
- Commitment to building enduring careers—not short-term production
- Growth-focused firm building enterprise value for the next generation

Interested candidates should contact Jackson Cown at jackson@scconsultingsvcs.com.