Wealth Manager (Alpharetta)

This Registered Investment Advisory firm is a fiduciary, fee-only firm with a comprehensive approach covering the full spectrum of wealth management, including investing and financial planning.

The Role

We are looking for an experienced Wealth Manager to deliver a high level of personalized, attentive service to our clients and serve as a primary resource for all financial needs. You have a passion for making a positive impact on clients' lives. You are a proactive learner who produces results amid varying work demands. As a growing company, we offer plenty of opportunities for internal growth and career development. This works with the President and other Senior Advisors of the firm.

Responsibilities include, but are not limited to:

- Be a resource for clients on investments, tax planning, estate planning, insurance, education and retirement planning for ultra high net worth clients $3-5M+ and above
- Conduct in-depth reviews for clients and prospective clients
- Develop financial plans and strategies to achieve clients' unique financial goals
- Facilitate meetings with clients and potential clients
- Identify opportunities or pitfalls that may be present when it comes to all facets of a client's financial picture
- Keep abreast of the ever-changing landscape of financial planning, including economic, legal, and investment trends, and general market developments and business challenges that may affect affluent clients
- Actively work with members of the operations, planning and investment teams to create/incorporate best practices
- Collaborate with CPAs, attorneys and other Centers of Influence to meet client goals and needs

Requirements:

- Bachelor's Degree, preferably in finance or accounting
- 6-10+ years in a client-facing role
- CFP®, CPA or CFA designation required
- High-level financial planning and estate planning experience preferred
- Familiarity with the unique aspects of working with small business owners and physicians
- Knowledge of Salesforce, Black Diamond, BNA, eMoney, Fidelity and Schwab platforms a plus
- Ability to hit the ground running with building trust and confidence with existing and new clients
- Strong knowledge of the RIA, fee-only space

What We Offer:

- Coverage on the first day of employment for medical, dental, and vision insurance
- 401k Matching Plan
- Paid Parental Leave
- Student Loan Assistance
- Pet Insurance
- Flexible Benefits (FSA, Pre-tax transportation, HSA Employer Contributions)
- Work/life Balance: Vacation time, flexible schedule
- Career Path Opportunities

Please contact Shari Cown at shari@scconsultingsvcs.com