Dynamic and growing Wealth Management Firm looking for Associate Wealth Advisor with financial planning and client service focus.

Total Wealth Planning, LLC arranges more than just the money, investment, or retirement aspects of our clients' lives. We serve as a sounding board for personal decision making. We help clients bring all the key elements of their financial life in order and give them more comfort with their long-term financial security.

Our boutique wealth planning firm is growing and seeking a full-time Associate Wealth Advisor with great communication skills, excellent attention to detail, a passion for helping others and genuine interest in financial services. This position will be responsible for supporting a group of the firm's client service needs, as well as, supporting the financial planning team with plan creation, updating and assisting the firm's wealth advisors with meeting preparation, follow up and client problem solving needs.

Position Responsibilities

- Professionally communicate with affluent clients (in writing, verbally, and in person) to deliver superior client service (but not advice).
- Assist advisors during client meetings with preparation and follow-up.
- Developing expertise using retirement and tax planning software under the guidance of the firm's wealth advisors.
- Complete insurance related research on insurance products including life insurance, group benefits, and long term care insurance.
- Preparing insurance needs analysis reports and obtaining quotes and product understanding
- Preparing retirement and college funding projections.
- Supporting advisors of the firm by implementing advice through means of paperwork, communication, and record keeping.
- Coordinate account transfers, deposits and distribution requests
- Onboarding new clients by following the established firm procedures and focusing on an outstanding level of attention, care and communications with new clients.
- Assist the team with other professional or administrative duties in order to achieve an outstanding client experience.

Required Knowledge, Skills and Abilities:

- Excellent attitude and passion for extraordinary client service.
- Strong focus on getting details right the first time. Quality over Quantity.

- Follow company policies, especially those regarding ethics and compliance.
- Outstanding organization skills and the ability to balance multiple tasks simultaneously
- Self-motivated and ability to work independently without direct supervision
- Excellent interpersonal skills with the ability and desire to work in a small company office.
- Proficiency with MS Excel, Word and Outlook. Also, demonstrate the ability to efficiently use Google or other internet means for research and questions.
- Knowledge of tax, insurance and other financial planning related topics a plus.
- Bachelor's degree in a related business field (Accounting, Economics, Business, etc.)
- Previous client service experience is ideal.
- Series 65 IAR license a plus. (Requirement to obtain within first 12 months)

Compensation & Benefits

- Competitive starting pay with bonus opportunity – no sales, no cold calling, no conflicts.
- 401k & Profit Sharing retirement plan (combined 5-10% company contribution after 12 months)
- Insurance benefits paid by employer: 95% for health, 100% for disability and life.
- Opportunity for advancement based on performance, personal growth, and cultural fit.
- Team oriented culture that is interested in helping you learn and grow in your career
- Other lifestyle benefits (Wellness, PTO, paid holidays, team lunches, etc.) provided.

CONTACT:

Please send a resume and cover letter explaining why you this position is a good fit for you and why you are interested in becoming a member of our team. All inquiries should be sent to Rob Lemmons @ rlemmons@twpteam.com

Since 1989, Total Wealth Planning has provided objective guidance to clients on their financial concerns, and provided solutions to reach their lifetime goals using a comprehensive wealth planning approach tailored to multi-generational families, business owners and corporate executives. We do this on an independent, fee-only basis and embrace the fiduciary standard, legally binding us to put client interests first. Our advisors listen to clients' needs, then craft personalized plans to meet client's most important lifetime goals. While many advisors limit their relationship to investment advice, our experienced team of professionals add value by coordinating planning services such as: retirement and college plans, tax planning and projections, insurance analysis, and estate and philanthropic guidance. Furthermore, we have ready access to a supplementary group of specialized and vetted professionals that include: accountants, attorneys, insurance agents, mortgage lenders, and others.