CROSSPOINT
WEALTH PARTNERS

NORTHWESTERN MUTUAL
PRIVATE CLIENT GROUP

Senior Planning Support Advisor Opening

Join the Team at CrossPoint Wealth Partners

Overview

We are seeking a Senior Planning Support Advisor to join our team, dedicated to providing exceptional service in executing and implementing financial plans for high-net-worth families. Your role will be pivotal in ensuring that our clients' financial strategies are executed with precision, efficiency, and exceed their expectations in terms of service quality and promptness.

About the Position

The Planning Support Advisor is part of our Operations Team career track which includes functions in:

- Operations foundations
- Client service
- Relationship management

These will be pivotal functions as you develop in the role with the option to further your skills with a company paid CFP Certification or to apply them if you already hold the CFP.

About Us

CrossPoint Wealth Partners is an experienced financial planning firm with the heart of a startup. Our entrepreneurial culture celebrates freedom and responsibility while maintaining a strong academic focus on our core specialty: financial planning. With over $400 million in assets managed for high-net-worth families and a team with five Certified Financial Planners, we're passionate about making a mark on our profession. We are affiliated with the Northwestern Mutual Private Client Group.

Our team was co-founded by Jarrod C. Markley, CFP®, ChFC®, MSFS and Rainer M. Schlichtherle, CFP®, CASL®. We have 7 team members, consisting of 5 CFP® Professionals and our service team.

Location

Hybrid position – Virginia candidates preferred as CrossPoint has offices in Richmond, Virginia and Charlottesville, Virginia. However, we will consider remote applicants that are near a Northwestern Mutual branch office in their locale. The position is largely remote but will require occasional office time and periodic company travel to Richmond, Virginia to connect in-person with colleagues and align on projects.

SENIOR PLANNING SUPPORT ADVISOR OPENING

Key Responsibilities

- Financial Plan Execution - Onboard financial plans developed by our lead planners, including opening investment accounts, rolling over assets, establishing insurance policies, and handling banking logistics to ensure accuracy and adherence to each high-net-worth family's unique goals and circumstances.
- Client Service Excellence - Provide prompt, accurate, and exceptional red-carpet service to our clients, exceeding their expectations and fostering long-term relationships.
- Oversee Account Maintenance – Complete client maintenance as needed including updating beneficiaries, updating client information, processing policy changes, conducting account transfers as well as account contributions and distributions, and any other maintenance needed.
- Compliance and Documentation - Ensure all actions comply with regulatory requirements and company policies. Maintain thorough and accurate records of all transactions and client interactions.
- Client Communication - Keep clients informed about the progress of their financial plan implementation, addressing any questions or concerns promptly and effectively.
- Continuous Improvement - Continuously seek ways to improve the implementation process and client experience.

Qualifications

- Bachelor's degree preferably in finance, accounting, or economics
- Minimum of 3 years of experience in financial planning, wealth management, or a related field, with a focus on high-net-worth clients
- Strong understanding of financial products, investment strategies, and tax planning
- Must have the ability to obtain necessary insurance and securities licenses
- Excellent interpersonal, communication, and client service skills
- Very high attention to detail with accuracy
- CFP or similar certification is highly desirable or willingness to obtain

Benefits

- Salary $55,000 - $70,000 – commiserate with experience
- Health insurance benefit—80% employer paid group health, dental, and vision insurance for employee and family
- Disability insurance benefit—employer paid short-term and long-term disability insurance
- Life insurance benefit – $50,000 employer paid group coverage
- Retirement benefit— 401(k)/Roth 401(k) with 4% match, plus discretionary profit share
- Employer paid approved professional designations such as CFP®, RICP®, WMCP®, and ChFC®
- Employer paid Financial Planning Association annual dues
- Flexible time off that promotes freedom and responsibility

To Apply

The application will begin with completing a one-hour assessment to reveal skills and aptitude and creating a one-minute video describing why you would be a good candidate. We will then be in touch with next steps.

To apply for this position, click here.