Cornerstone Wealth Advisors, Inc.
RESIDENCY in FINANCIAL PLANNING

Cornerstone Wealth Advisors, Inc. (www.cornerstonewealthadvisors.com) is a comprehensive financial planning and wealth management firm in Minneapolis serving clients in over 25 states and several foreign countries. Our only compensation for our services is the fees paid to us directly by our clients. We are known nationally for our work and writings in retirement distribution planning, career path development for young financial planners and the national leadership of the Financial Planning Association (FPA).

In 2010, we established our Residency in Financial Planning to serve the dual purpose of preparing select graduates of CFP Board registered financial planning programs for careers as financial planners in our profession and to meet the advisory needs of our firm in serving our clients. Two Residents have graduated from our program; another two Residents are in the midst of their residencies. We anticipate offering five additional three-year residencies this decade. Our program has been featured in several publications, including *Financial Planning* and *Financial Advisor* magazines.

We are currently seeking candidates for a three-year, full-time Financial Planning Resident for a residency to begin in June 2018. In this salaried position, our Resident will gain experience in all areas of comprehensive financial planning and wealth management by working with our nationally-recognized team of CFP® professionals. This group includes:

Amanda Ansell, CFP®	Resident in Financial Planning (2014-2018)
Andrea Eaton, CFP®	Financial Planner
Jonathan Guyton, CFP®	Principal and *Journal of Financial Planning* Retirement Columnist
Sara Kantor, CFP®	Financial Planner
Coresa Leighty	Resident in Financial Planning (2017-2020)

At the conclusion of these three years, our Resident will be exceptionally well-qualified to either obtain an advisory career-track position with an established financial planning firm or to begin their own enterprise.

Responsibilities (progressing in involvement and complexity throughout the three years):

- Client Interaction
  - Establish relationships with our clients
  - Participate in 4-6 client meetings each week from Day 1
  - Complete follow-up communication and implementation from client reviews
  - Participate in the new client discovery process
  - Participate in the development and presentation of financial plans to clients
  - Schedule client review meetings and determine agenda items
  - Provide answers to client telephone and e-mail questions as capabilities increase

- Back Office Support
  - Prepare agendas and reports for 4-6 client review meetings weekly
  - Review client investment portfolios relative to asset allocation strategy
  - Submit portfolio trades online
  - Update client data base in follow-up to review meetings

- Administrative Duties
  - Assist in answering incoming calls
  - Prepare forms for ongoing client plan implementation
  - Scan and organize client documents into client database
  - Assist Chief Compliance Officer
  - Assist with additional firm operations

- Miscellaneous
  - Review/Update website monthly as directed
  - Complete various financial planning and/or investment research projects as needed

Qualifications:

Trustworthy, ethical, appreciative, hard-working emerging professional
Commitment to a career as a financial planning professional
Completion of a financial planning degree at a CFP Board Registered Program
Outstanding academic achievement and related work experience
Excellent oral and written communication skills
Aptitude for applying financial planning knowledge to real-life situations
High personal standards with a team-oriented, fun-loving nature toward colleagues
Working familiarity with database and Microsoft Office software

Compensation:

Steadily-increasing Base Salary as abilities and experience grow
Individual health insurance – 90% company-paid
Annual company contribution to Heath Savings Account
Long-Term Disability (60%) and Group Life Insurance – 100% company-paid
401(k) Plan with Company Match
Profit Sharing Plan
Paid holiday and personal time off (23+ days annually)
Annual budget for Continuing Education
Reimbursement for CFP® exam prep course and CFP® Exam fee
Relocation allowance
Annual FPA membership with local chapter meeting season ticket
Introduction to our network of established planning firms around the country
Total first-year compensation: $55,000 - $62,000

Contact:

Applications close October 23rd at 8:00am Central time
Please respond in writing to andrea@cornerstonewealthadvisors.com
No phone inquiries, please

By mid-December, we will determine the finalists who will be invited to our Minneapolis office at our expense for a final interview in the ensuing weeks.