VisionPoint Advisory Group
WealthBridge Financial Planner

VP Mission/Vision: Build a professionally managed regional RIA business that impacts the personal and financial success of our clients, employees, advisors and owners.

Values: Interwoven into the fabric of every organization are the strategic values that either propel the organization forward or keep it mired down in complexity and mediocrity. We believe the following to be the strategic values that will have a profound influence on our corporate and individual success

Who do we need to drive our vision?

1. What we must be able to do:
   a. Collaboration - we can't do it alone. It takes a team.
   b. Serve - our influence comes in the way we can impact others.
   c. Impact – change making is the difference maker.
2. Who we need to hire:
   a. Humble - Looking out for the interests of others.
   b. Hungry - this is how we contribute.
   c. People smart - emotional intelligence commoditization

Companies are networks of inter-dependent relationships. Companies work best, therefore, when all employees see that they are in the business of serving one another and that in the end they are also serving themselves. **Stephen Covey**

YOUR PRIMARY ROLE: Develop and construct high quality and compliant comprehensive advice documents for Financial Advisers' clients that are customized, researched and technically accurate with recommendations that are appropriate, measurable and actionable.

Position Title: WealthBridge Financial Planner

Location: DFW

Job Purpose:

As the firm continues to seek an aggressive growth strategy it is imperative that we continue to build out a premier financial planning program that supports our teams, attracts advisors, and contributes to the overall profitability and value of the firm.

Additionally, the firm is seeking qualified leadership in all its executive positions that will enhance the sustainability and long-term success of the firm. To that end this position requires leadership that will meet the tenants and vision of the WealthBridge department.

Secondary leadership initiatives:

a. Provide a positive personal example through words and behavior that reflect the values established by the owners.
b. Displays personal integrity, supports the employees at all levels in the firm; assume responsibility for actions and holds others accountable.
c. Fosters a learning organization where mistakes are identified, owned and where the firm and the employees develop and grow personally and professionally.

Key Responsibilities and Accountabilities:

- Collaborate with Financial Advisors across nation via multiple communication platforms (in-person, phone, GoToMeeting, email, etc.)
- Preparing PFO (Personal Financial Organizer), including (but not limited to) Financial Plan, Statements of Advice, Records of Advice and Value Propositions, ensuring compliance with industry regulations regarding financial advice
- Adhering to budgets for produced documents
- Ensure turnaround times and deadlines are appropriately managed
- Researching existing and potential replacement products in order to prepare the most appropriate recommendation for a client in an advice document. E.g. product comparisons, insurance analysis and quoting, contacting funds for information
- Prepare advice in accordance with Certified Financial Planning advice guidelines
- Ensure advice is prepared in accordance with our licensee policies and guidelines
- Ensuring quality and compliance of documents prepared
- Manage relationship with Financial Advisor and other team members to ensure consistent delivery of services, within agreed timeframes and fee agreements
- Performing quality and compliance reviews of advice documents, internally and externally, to ensure high levels of quality are maintained
- Complete projects identified for the overall team to enhance services within the team or wider business
- Supports and contributes to the firm recruiting process "Strategic Breakthrough"
- Works with CCO to maintain compliance superiority
- Maintain good relationships with representatives of our external financial partners
- Assist the CEO in annual and strategic planning
- Complete reporting to the executive committee

Job Requirements

- Must possess ability to engage others and to work collaboratively with all departments across the company. Must also have ability to manage multiple priorities effectively with a strong commitment to achieving the goals of the department and the firm.
- Understanding of Financial Planning process, with a high level of detail & accuracy
- Excellent inter-personal skills, both written and verbal
- Ability to achieve agreed outcomes without supervision
- Ability to work independently and within a team
- Bachelor's degree
- 1-3 years of progressive career experience
- Financial Services industry experience preferred
- CFP (Certified Financial Planning designation) preferred
- Dependable and reliable

Skills and Qualifications:

Financial Planning and Strategy, Strategic Planning, Vision, Quality Management, Promoting Process Improvement, Dealing with Complexity, Effective Leadership.

COMPENSATION:

- Base Salary + Short-Term Incentive Bonus + Long-Term Incentive
- Benefits: Medical, Dental, Vision, Life, STDI, LTDI, Life & Vacation