WEALTH COVENANT
GROUP, LLC

Wealth Plan Specialist / CFP®

Wealth Covenant Group, located in Houston, is seeking a Wealth Plan Specialist to join our team. We work with a select group of families and strive to offer more than just excellent wealth management services. It is our passion to help our clients achieve what's important to them, and our joy to come beside them as their trusted advisor.

The Wealth Plan Specialist is responsible for the creation and maintenance of clients' comprehensive wealth plans. The Wealth Plan Specialist coordinates the completion of action items with clients and clients' advisors (CPA, Estate Attorney, etc.). This is a great opportunity to play a key role in the lives of our clients and the continued success of our company.

Responsibilities & Activities

- Generate and maintain comprehensive wealth plans and client portals
- Create wealth plan presentation items for client meetings
- Coordinate completion of action items with clients and clients' advisors (CPA's, Attorneys, etc.)
- Client interaction through phone, email, mail or meeting
- Perform investment, tax planning, asset protection and estate planning research and analysis
- Establishment or execution of new accounts, transfers, deposits/withdrawals, and trades
- Develops, maintains and enhances written systems of all wealth planning and office activities

Educational & Industry Requirements

- CFP®
- Minimum Bachelor's Degree
- Minimum of 3 years of professional wealth management or financial services experience

Knowledge, Skills, & Abilities

- Proactive and strong work ethic
- Excellent attention to detail and extremely organized
- Strong analytical and problem-solving skills
- An ability to prioritize and manage multiple tasks concurrently…follows up and follows through
- Desire to serve clients and Team Members with excellence
- Engaging communication skills and work well in a team environment
- Highly proficient in financial planning software (eMoney a plus) and Microsoft Office Suite

Our culture promotes collaboration, professional growth, and a commitment to providing exceptional client service. If you have a relentless, burning desire to succeed and love helping people, then we would love to hear from you!

Please send your resume and letter of interest to dennis@wealthcovenantgroup.com .