Wealthway Financial Advisors
Planning for Life

440 Monticello AVE, Ste. 1620
Norfolk, VA 23510
757-456-2200
wealthwayadvisors.com

Our Firm

Wealthway Financial Advisors is a $130 million AUM fee-only wealth management firm with 190 client relationships. We were founded in 1995 as an independent RIA and we take our fiduciary duty to heart. To help support our continued growth, we are seeking an Associate Financial Advisor to join our team. We are interested in you if you are an aspiring CFP®, seek to work with clients immediately as part of the existing advisory team, desire to be mentored by experienced CFP professionals, and are eager to learn the business from the ground up. Sourcing clients may become an opportunity over time, but is not expected of this position. This is a challenging position that requires you to work closely with the firm's advisors and employees to provide day-to-day financial planning support to clients and prospects.

We are located in vibrant and diverse downtown Norfolk, VA, where one can happily live, work, and play. Our office is thirty minutes from the Atlantic Ocean and twenty minutes from the Chesapeake Bay in nearby Virginia Beach. Quality of life is high in the Hampton Roads region – named for the many waterways that surround us – where residents often feel as if they "live a vacation."

What you will get to do:

- Work with the team to develop meeting agendas and prepare for client and prospect meetings.
- Attend various client and prospect meetings; take notes, operate software programs, and develop list of action items.
- Implement and proactively follow up on action items resulting from meetings.
- Coordinate with client's strategic alliances and manage overall implementation work flow.
- Work closely with Admin Staff to coordinate client account paperwork and custodian related service activities.
- Master Junxure CRM software and own any projects associated with it.
- Develop comprehensive financial plans in eMoney software, present findings and recommendations to the firm's lead Financial Advisors.
- Assist with radio show topic selection and client newsletter development.
- Substantially impact our growing firm by protecting and caring for the financial lives of the clients we serve.

What you will learn:

- How all aspects of a small for-profit business come together to serve clients.
- How to deliver expert investment management and comprehensive financial planning to appreciative clients.
- How to use PortfolioCenter to produce financial reports and eMoney to deliver meaningful financial plans.
- How to use Junxure to manage organizational workflow and Morningstar to develop investment portfolios.
- How to assess a client situation, develop recommendations, and deliver them to high net worth clientele.
- How to ask the right questions at the right time and actively listen at the appropriate time.

Compensation and other benefits:

- Competitive salary
- Participation in company bonus program after one year
- 401k and profit sharing plan
- Company paid holidays
- Company paid on-site parking
- CFP Exam reimbursement upon passing the exam
- Paid training and professional memberships
- Personal mentorship by experienced CFP professionals

Required Qualifications

- Bachelor's degree in Financial Planning or related business coursework
- Must pass the CFP® exam within 18 months of hire date
- Ability to identify, follow through, and meet client needs
- Detail-oriented yet understands that assumptions will need to be made at various times and you must move on to meet deadlines.
- Must be a self-starter, problem solver, and goal-oriented team player with a "no job is beneath me" attitude. There are no small jobs here.
- Able to work independently and keep team aware of progress and hurdles.

If interested, please submit a resume and persuasive cover letter by **February 28, 2019** via email to: Allison@wealthwayadvisors.com