

# New CFP® Certificants – Irving, TX

**Creating & Managing Wealth, LLC (CMW)** has a new and exciting opportunity available for a new **CFP® certificant** located in Irving, TX.

For 30 years, CMW has been providing professional guidance and innovative solutions for the investment and retirement planning needs of educators across the country. The CEO, Christina Winters, also specializes with women, especially those dealing with the death or divorce of a husband. CMW has partnered with **Lincoln Investment** as its full-service Broker-Dealer and Registered Investment Adviser. Together, the commitment is to help our clients work toward reaching all of their financial goals.

Initially, the successful candidate will have the opportunity to learn CMW's business from the "ground up" by sitting in on the CEO's appointments. Ultimately, the candidate will work closely with prospects and clients as a Financial Professional.

The candidate will be provided with leadership, guidance, training and support while working in our beautiful Las Colinas office.

## **The qualified individual will:**

- Be able to work collaboratively with CMW management and support staff
- Be a "quick study" to learn all aspects of the business
- Understand that our value lies in the depth of client relationships and is exceptional at developing them
- Be an established, consummate professional at all times, both internally with our team and externally with the public

## **Desired Skills and Experience:**

- Bachelor's degree **required**
- Passed the CFP® exam
- Excellent written and oral communication skills
- FINRA SIE, Series 7 and 66 **preferred (or ability to pass within in 6 months)**
- State insurance license **preferred (or ability to pass within in 6 months)**

## **Company Overview**

As Stakeholders, we trust and value each other as special members of the Creating & Managing Wealth family. We appreciate one another's unique talents, optimism and energy. We are empowered to make a difference and we are grateful for the dedication we share with our clients, and one another, every day! We are the heart of the Caring Standard. We offer commitment, trust, responsiveness, compassion, and knowledge for all of those who come in contact with us. We recognize our exceptional contributions to our community, and strive to make Creating & Managing Wealth a great place to work. Together, we celebrate our commitment to make a real and lasting difference in the lives of one another, and the people we serve.

For more information, please visit our website at <http://cmwfinancial.com/>