**Financial Planner/Client Services Associate**

Imperium Wealth Management is a fee-only wealth management firm that provides comprehensive advisory and investment services. Our goal is to have all things financial working in concert with one another to deliver a result in which the whole is greater than the sum of the individual parts. We take a complete and comprehensive approach to managing all aspects of our clients’ financial lives, and believe that a customized, written financial plan that focuses on the actual numbers instead of pretty pie charts is the keystone to all financial decisions and our clients’ financial success.

Our ideal candidate is someone that is high energy, reliable, dependable, and very loyal. They have a strong sense of doing the right thing and should be passionate about helping others. **Resourcefulness and strong attention to detail are vitally important for this role.**

We are seeking a friendly, professional, and outgoing person who enjoys working with people and has great phone etiquette. The candidate will have the opportunity to build a career with our firm. We look at this position as a starting point in order to learn the business, get on-the-job training, and hands-on development in order to progress in the Imperium structure to become an advisor should they desire that. We view this job as an advisor incubator program to develop future talent from an entry level position into an elite financial planner and advisor. This program is intended to establish a solid foundation from a financial planning & client services standpoint to build the candidate from the ground up by learning advanced financial planning skills.

Our firm specializes in providing financial planning, investment advice, & financial services to high-net-worth individuals across a broad range of topics on a fee-only basis as well as tax planning, preparation, and accounting services. The candidate needs to be detail oriented and a team player with a positive attitude, who enjoys helping people. The ideal candidate for this position would be one that wants to gain a complete understanding of the wealth management business along with our financial planning philosophy so that he/she might grow with our firm

**Duties:**

Duties include, but may not be limited to:

* Financial Planning development
* Executing advisor recommendations on clients’ behalf
* Handling the process of opening accounts, sending funds, and other client service requests
* Assist in monitoring and maintaining client accounts
* Greeting clients and answering client phone calls
* Maintaining our client relationship management software with up-to-date key client information
* Sending client correspondence, as needed
* Supporting the Client Services & Tax Team
* Assisting in the preparation of client reports and other materials needed for client meetings
* Filing, scanning, and copying documents
* Assisting in data entry such as filling out account paperwork and entering client meeting notes
* Performing research for a variety of projects, events, and office enhancement as needed
* Assisting in gathering tax documents for CPA
* Able to be here during office hours 8am-5pm
* Other duties as necessary—we are very much a culture where “that’s not my job” doesn’t work

**Qualifications:**

* Bachelors degree preferred
* Professional but easy to get along with
* Must be comfortable engaging in conversation over the phone and in-person
* Must be able to establish rapport with current & prospective clients
* Must be able to work with Microsoft Word, Excel, & Outlook
* Must be detail oriented with proven organizational skills
* Must have proven written and verbal communication skills
* Must be client service oriented and a team player
* Must be dependable, self-motivated, and be able to show up to work on time
* Must be able to work efficiently and independently with little supervision
* Must demonstrate ability to apply problem solving skills and utilize independent judgement
* Must be able to multi-task
* Must demonstrate an interest in helping people
* Must have leadership capabilities to see projects and initiatives to completion
* Excel in incredible follow up skills with clients
* Someone that does what they say they’re going to do

Benefits include:

* Competitive salary with bonus
* 401(k) with employer contribution
* Paid time off starts at 2 weeks for the first year, accruing an extra week for each additional year, then 6 weeks after year 5 along with all market holidays
* Free brokerage
* Access to all company resources
* 50% paid health insurance paid plus access to dental, vision, life, and other group insurance.
* Paid continuing education

If you are interested in applying for this position, please submit your resume to: Chris Holden at [careers@imperiumwealth.com](mailto:careers@imperiumwealth.com)