## Flourish Wealth Management – Wealth Manager

*About Flourish*

Flourish Wealth Management is an independent, fee-only, boutique wealth management firm located in Edina, Minnesota that provides hands-on expertise focused solely on the best interest of each client. Our proactive approach integrates industry-leading financial solutions as well as new and innovative strategies. We will discern all possibilities and advise the most advantageous course of action, allowing our clients to focus confidently on what matters most. At Flourish, our trusted advisors help ensure preparation for the future - no matter what it brings.

Flourish Wealth Management is looking for a Wealth Manager to join our successful and growing firm. The Wealth Manager position combines multiple aspects of the wealth management business with a focus on exceptional client service and enhancing the wealth management offering. This position offers tremendous future growth opportunities and the ability to leverage entrepreneurial spirit.

### Position Responsibilities:

- Provide customized holistic wealth management services designed to meet the unique needs of each client through the Flourish Experience™.
- Develop financial plans and proactive planning recommendations (i.e., retirement planning, tax planning, estate planning, risk management, investment management)
- Involvement in all aspects of client meetings including preparation of meeting agendas, client paperwork, investment policy statements, asset allocations, financial analysis, meeting notes, and post-client meeting tasks.
- Integrate investment solutions by coordinating portfolio implementation strategies and reallocations.
- Lead and enhance Flourish's wealth management offering by creating tools, templates and procedures that ensure consistency and exceptional client service.
- Participate in business development through prospect discovery and proposal meetings.
- Ability to develop professional network through centers of influence and community involvement.
- Ability to jump into general operations with a can-do attitude.

## Personal Requirements & Qualifications:

- Minimum 2 to 5 years of industry experience
- CFP® designation preferred or pursuing
- Excellent attitude and an extraordinary client service orientation
- Excellent interpersonal and relationship management skills
- Strong technology skills and able to quickly learn new software (Orion, Salesforce, MoneyGuidePro, Sharefile)
- Self motivated, with the ability to prioritize tasks with little direction and commitment to do anything to get the job done
- Intellectual curiosity, with a high attention to detail
- Ability to lead firm projects
- Strong written, verbal, math, financial, analytical, problem solving, and organizational skills
- Proficiency with Microsoft Office suite (Word, Excel, PowerPoint)
- Passion to be successful in a collaborative and entrepreneurial atmosphere

## Salary and Benefits:

- Competitive salary based on skills and experience
- 401k plan with employer contribution
- Medical plan and Health Savings Account contribution
- Employer paid long-term disability coverage
- PTO plus bonus holiday week
- 9 paid company holidays
- Paid professional dues, continuing education conferences and training
- Paid time off for volunteer opportunities

For additional information on Flourish Wealth Management please visit www.flourishwealthmanagement.com. If interested in this position, please email resume and cover letter to Kathy Longo at info@flourishwm.com.