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Relationship Manager
Dallas, Texas

Intrua Financial is a boutique Registered Investment Advisory firm. We are based in Houston, Texas, and service advisors and clients nationwide. We are committed to being involved beyond what is expected and to providing comprehensive strategies and delivering high level client experience.

We are looking to fill a position in our Dallas, Texas office.

Qualifications

Bachelor's degree

Proficient computer skills, including Microsoft Office Suite (Word, Excel)

Experience in eMoney and Redtail CRM (Preferred)

Excellent written and verbal communication skills

Excellent project management skills with ability to prioritize and track multiple tasks

Strong analytical skills and detail oriented

Job Summary

A Relationship Manager acts as an extension to the financial advisor and helps manage and expand client relationships. They will provide support to the advisors in the Dallas, Texas office, by attending client meetings, making sure follow up items and recommendations are completed, and providing additional outreach to clients. They will also be part of the financial planning team that is based in Houston, Texas. As a member of the Intrua Team, they are expected to provide support when needed and to provide new ideas to help enhance our financial planning process.

This job would be located in Dallas, Texas, but does require 6-12 months in the Houston, Texas office. This time will be spent learning our processes, systems, and values. You would also spend this time getting licensed and preparing for the CFP® exam.

Primary Duties

- Work closely with the financial advisor and their clients
- Provide support with client meetings
 - Preparing investment reports and account summaries
 - Attend meetings
 - Implement meeting follow up items and recommendations
 - Monitor accounts
- Complete the practice standards of the financial planning process from data gathering, presenting plans in client meetings, and implementing and monitoring recommendations
- Work closely with the financial planning team in the Houston, Texas office virtually
 - Provide support for the other advisors in preparing and presenting financial plans

How to Apply

Please email your resume to:

Courtney Garner, CFP®
Director of Financial Planning
courtney@intrua.com

