**Relationship Manager**

Description:

Relationship Managers are an integral part of Texas Legacy Wealth Management.  We are currently seeking a motivated individual to join our team in this capacity.  A successful candidate will display a high degree of professionalism, have strong interpersonal skills, and demonstrate an ability to engage existing clients.  This person will assume the responsibility of administrative support to the firm’s advisors with wealth management services in order to help clients pursue their stated goals.

We compensate all Relationship Managers with a base salary plus a bonus model that rewards individuals that can manage objectives and service goals. We also offer a 100% Employer paid Employee Health Insurance Plan and a Company Matched 401k Profit Sharing Plan. Full Detail of other benefits offered at Texas Legacy Wealth Management is available upon request.

If you want to be recognized for your ability to deliver efficient, professional service to wealth management clients, please email your resume to [liza@texaslegacywealth.com](mailto:liza@texaslegacywealth.com).

**Responsibilities & Activities:**

Administrative support to the firm’s advisors with wealth management services in order to help clients pursue their stated goals

Assists in research

Helps maintain positive and constant contact with clients on behalf of the firm

Assists other team members as requested

**Knowledge, Skills & Abilities:**

Excellent interpersonal skills

Excellent attitude and an extraordinary client service orientation

A genuine interest in serving and caring for other people

Excellent organizational and time management skills

A burning desire to succeed

An ability to handle multiple tasks

Previous 2 years of financial service experience in working with and speaking to retail clients

FINRA Series 7, 63, and Series 65 or 66 registrations