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Wealth Planner Job Description

Are you ready to fulfill the lives of others? True North Advisors is currently hiring a **Wealth Planner** position. True North is an Independent RIA that serves the wealth management needs of high net worth individuals and institutional clients. Our investment philosophy is heavily biased to fundamental analysis and value investment principles. **This position will be in Fort Worth, Texas**

**The primary role** of the Wealth Planner is to support the wealth planning and wealth management teams with planning specific matters. This polished, friendly, detail-oriented professional has outstanding communication skills, and the ability to manage their time effectively when faced with a variety of deadlines and competing demands.

**Required Education, Skills & Experience:**

* Bachelor’s degree from an accredited University with a minimum cumulative GPA of 3.4. Degree in Personal Financial Planning, or a degree with a Personal Financial Planning emphasis, preferred;
* CFP® designation required; other designations are a plus (e.g. JD, CPA, CPWA)
* A minimum of five years of financial planning experience required;
* Motivated by serving and using their talents to help others;
* Problem solver, influencer, positive attitude, assertive, responsive, energetic, relational, proactive, reliable, accurate, quick-learner, professional, observant, organized, proficient with technology, driven, strong attention to detail, ability to handle competing demands efficiently and calmly, focused on quality, strong communicator
* Committed to excellence, integrity, and accuracy;
* Ability to deliver high quality client service in a professional, caring, and compliant manner;
* Can communicate effectively in person, in writing, and verbally with clients, prospects, and co-workers;
* Experience with Salesforce, MGP, RightCapital and Schwab software highly desired;
* Excellent work references required, preferably from former direct supervisors;
* Must consent to and have favorable credit report and background check;
* Ability to exude True North’s Core Values: Others First, Run Through Walls, Restless Pursuit of Growth, Do the Right Thing or Make the Thing Right, Teamship, and Solutions Oriented/Positive Outlook.

**Duties and Responsibilities**

* Assist with wealth planning team client deliverables, research projects, process building & implementation, and planning checklists;
* Assist the wealth management team on pre & post meeting wealth planning projects & deliverables;
* Work with outside advisors to develop complex client specific estate and tax planning strategizes;
* Manage and train newer wealth planning team members;
* Research and solve complex client planning issues;
* Generate and present new planning topics to the firm;
* Act as a planning knowledge resource for questions that arise within the firm;
* Monitor, assist, and complete complex wealth planning task, as requested, ensuring that deliverables are consistent across the firm;
* Stay up to date on potential legislation that could impact planning tactics for high net worth clients;

**Benefits & Perks:**

* Competitive base salary;
* Target year-end incentive compensation of up to 20% of base salary, based on successful execution of firm goals and individual performance metrics;
* Generous PTO;
* Self-directed 401(k) program with employer contribution;
* Volunteer Time Off;
* Ability to telecommute up to two days/week after 30 days of employment;
* Employer reimbursement for successful completion of applicable professional designations and CE credits;
* Employee premiums for medical, dental, life and long-term disability insurance are covered 100% by employer;
* Employer contribution of $2,000/year into individual Health Savings Account, for all employees enrolled in our medical insurance;
* Free Financial Planning services for employees and their spouses;
* Fun and energetic work environment!

**Background:**

True North Advisors was founded on the shared vision that the only way to truly provide clients with trustworthy advice is through *complete independence, objectivity and the absence of conflicts of interest*.

We seek to provide peace of mind to our clients and their families. Managing an individual’s wealth is more than just dollars and cents. At True North, our Wealth Advisors work collaboratively with our Wealth Planning team using every lens to create comprehensive wealth plans. We offer innovative planning to provide perspective, opportunity, and fulfillment in every area of our client’s lives. We were an early adopter in recommending private investments, including public and private platform opportunities in real estate, private equity, and energy. We exercise financial discipline, ensuring our client’s personal goals are met.

Established in 2000, our mission has been to help our clients lead more fulfilled lives through trust, personalization, and simplicity. Go North today and join us to help us continue to fulfill lives.