

RECRUITER



Jayla Blakemore

jblakemore@newplannerrecruiting.com

INTERESTED?

Apply here:

<https://bit.ly/3y4WhXk>



NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing a well-established fee-only firm in Boulder, Colorado that is seeking a Lead Advisor to join their team. Detailed job specifications available once we connect and agree it is a mutual fit.



CERTIFIED B-CORP, ESG FOCUS, \$475M AUM

Our client is an independent boutique investment and financial planning firm of 8 that offers impact investing services as part of a comprehensive approach to providing solutions to their clients. This is the perfect opportunity for someone who is enthusiastic about helping people make the most meaningful use of their personal and financial resources in a fiduciary capacity. Their tech stack includes Money Guide Pro, Orion, Wealth Box, Schwab, Hidden Levers & Eclipse. If you are seeking a high growth firm with substantial career upside and mentorship this is the firm, for you.



RESPONSIBILITIES WE'LL TRUST YOU WITH

Establish and maintain close working relationships with clients and staff. Lead client meetings independently or in collaboration with other advisors. Document discussions and action items in the meetings. Follow up with clients in an efficient, timely manner. Respond to client inquiries and delegate implementation duties to other team members, as needed. Prepare client financial plans that are thorough, accurate, and easy for clients to understand using financial planning software. Assist with developing and refining internal workflows and client deliverables. Contribute to the firm's culture of social responsibility, cohesion, and growth.



QUALIFICATIONS

Bachelor's degree from an accredited university; major in financial planning preferred. CFP® or CFA designation. 3+ years of experience as a financial advisor. Experience with high-net worth clients is a plus. Entrepreneurial spark. Business development skills and/or existing clientele are a plus. Strong analytical and communication skills, and experience with industry software. Self-starter with a passion for delivering exceptional client-centered service. Dedicated to making a positive lasting difference in someone's life and the overall community.



THE PERKS

Competitive salary based on experience. Performance-based pay program and career track. Health, dental and 401k, with annual safe harbor employer contribution. Equity ownership potential. Educational reimbursements (continued education, conference attendance, training budget, etc.) and paid professional dues. Supportive work environment with a healthy work/life balance.