Position: Financial Advisor

Bond&Devick Wealth Partners is seeking an individual who aspires to work in a fast-paced, team-oriented environment where integrity and respect for our clients and each other is of utmost importance.

Bond&Devick Wealth Partners Overview

We are a goals-based, comprehensive, fee-only wealth management firm located in St. Louis Park, MN. Since 1982, our emphasis has been on helping our clients reach their goals by using Goals-Based Financial Planning. We have a longstanding engagement and commitment to our community, and we were the first Certified BCorp financial planning firm in Minnesota. We deliver value in values by aligning our clients' goals and values with their investments.

Client Responsibilities

- Draft financial plans
- Perform asset allocation analysis necessary for client onboarding and portfolio reviews
- Create custom analyses of financial decisions
- Prepare presentations and materials for client meetings
- Attend client meetings with Lead Advisor and assist with follow up
- Respond to-client questions and service requests

Team Responsibilities

- Work with Wealth Management and Operation Teams
- Support Lead Advisors

Firm Responsibilities

- Understand and support the firm's vision, mission, and strategy
- Engage in teamwork and teambuilding
- Integrate into the firm's culture

Growth Responsibilities

- Support Partners by creating presentations and materials for business development meetings
- Attend business development meetings with Partners and take responsibility for follow-up tasks
- Lead for prospect data gathering and plan development for client onboarding process

Skills Required

- Knowledge of the financial planning process
- Exceptional communication (written and verbal)
- Excellent technology aptitude
- Focus on attention to detail
- Client experience oriented
- Experience in financial services industry, preferably an RIA firm

Skills Being Developed	▪	Knowledge of planning areas including financial planning, investments, budgeting, taxes, risk management and estate planning
	▪	Communicating with clients in an effective manner
	▪	Working with other experts (Insurance, tax, estate, etc.) for clients to ensure their complete financial picture is in order
Technology	▪	Proficient in Microsoft Office (Word, Excel, PowerPoint, Outlook)
	▪	Knowledge of custodial platform (Schwab), portfolio management (Morningstar and Money Guide Pro), BNA Tax Software, client reporting (Black Diamond) and CRM (Redtail)
Degrees/Designations	▪	Bachelor's degree required
	▪	CFP® designation (or working towards)
Compensation	▪	Total compensation based on experience and education
Benefits	▪	401k Retirement Plan Match
	▪	Quarterly Employee Incentive Profit Sharing
	▪	Group Health and Dental, HSA, FSA
	▪	Group life, long-term disability, AD&D insurances
	▪	Paid Time Off: 120 hours/weeks per year for first 4 years
	▪	12 days plus up to 6 half days paid holidays
	▪	Work-Life Flextime
	▪	Charitable match
	▪	Wellness, Sustainability, and Technology reimbursement programs
	▪	Paid professional memberships, conferences, and training
	▪	2-week Sabbatical after 5 years of service
Hours	▪	Full-time: Monday-Thursday 8am-4pm, Friday 8am-3pm
Other	▪	90-day probation
	▪	Non-solicit contract

For more information about our firm, visit our website at www.bondanddevick.com. Please email your cover letter and resume to Kristine Bisanz at kris@bondanddevick.com.