

Lead Advisor

Minneapolis, MN

Brighton Jones, one of the country's fastest growing wealth management firms, is looking for a Lead Advisor to join the team and provide immediate positive service impact for our clients.

Do you have a passion for helping others? Are you naturally curious, comfortable working in a team-based environment and committed to exceeding client expectations? If so, we should talk. We are expanding to new markets and looking for Lead Advisors who have their CFP® and a passion for helping clients. We're looking to expand to Dallas, Houston, Chicago, Minneapolis, Tampa, Atlanta, Raleigh Durham, Boston, and Philadelphia currently.

Who are we? Brighton Jones is one of the nation's fastest growing RIA's headquartered in Seattle, Washington. Over the past 20 years our team-based approach, relentless focus in evolving our service model, and operational foundation has enabled us to grow 100% organically from a 2 person start up to a 180 person enterprise, helping over 2,000 families and advising on over \$8B in assets. We continue our growth as we plan to expand into 30 new markets, grow to 2,000 team members strong, and serve 30,000 clients. Creating and maintaining an incredible culture is our secret sauce and our goal is to make sure each of our teammates loves working here, what they do, who they do it with, and who they do it for.

YOUR ROLE

This position has primary responsibility for client relationships, and works closely with each client to establish their comprehensive wealth management strategy. A Lead Advisor has extensive client contact and directs both internal and external resources to accomplish client objectives.

- Work with existing clients (where applicable) and onboard new clients; lead the client relationship, deliver an exceptional experience, and design, implement and manage the wealth management plan that supports their passions and purpose - their "Life Plan"
- Leverage internal and external resources to achieve client objectives in such areas as Investment Management, Estate Planning, Tax Planning, Risk Management and General Planning
- Communicate our unique value proposition to prospective clients and work to establish Brighton Jones as their trusted financial advisor
- Proactively develop and expand relationships within the community
- Cultivate and develop deep relationships with custodial retail branches in collaboration with the national team
- Create opportunities and represent Brighton Jones at public speaking events including community events, industry events, etc.
- Lead a local service team with deep collaboration to ensure client retention and satisfaction is high with a relentless focus on remarkable service.

YOUR EXPERIENCE

- Candidates must have a four-year degree and the CFP designation
- 6+ years in financial and/or estate planning related work, preferably at a professional financial services company or wealth management firm

- Expertise in estate, tax, retirement, insurance, investment, and cash flow/capital needs planning analysis
- Unquestioned commitment to integrity in personal and professional activities
- Highly motivated with ability to function well in a fast-paced environment
- Self-starter by nature
- Excellent organizational, leadership, communication and presentation skills
- Able to manage heavy workloads and projects, many on a time-sensitive basis, as well as interacting with tight-knit team of professionals with a range of financial and tax activities.

OUR CULTURE

At Brighton Jones, we like to win. For us winning means continuous improvement - as individuals, as teams, and as a company. Everyone at Brighton Jones commits to developing the skills of curiosity, open-mindedness, vulnerability, empathy, and compassion in order to respond more thoughtfully to life and to create a culture of continuous improvement. Our Mindfulness-based Emotional and Social Intelligence (MESI) gives us a foundation of practices and a shared language to develop these skills. When we master these skills we not only win, we Live a Richer Life.

Our Team Personality is:

- **Genuine:** Our unquestioned commitment to integrity is reflected in all our personal and professional activities.
- **Focused:** We work together to manage heavy workloads and time-sensitive projects. We thrive in a fast-paced environment that fosters continued growth and development.
- **Approachable:** We enjoy interacting with each other and our clients, always projecting a professional, friendly, and capable image in everything we do.
- **Invested:** Our commitment to our clients and each other means that we are willing to maintain a flexible schedule to address cyclical work periods.
- **Driven:** We possess sound judgment, initiative, and decision-making skills. We anticipate problems, determine the appropriate level of response, and act accordingly.

Our Team Pillars are:

- Compassion
- Commitment
- Community
- Collaboration
- Continuous Growth
- Curiosity

HOW TO APPLY

Website: <https://jobs.lever.co/brightonjones?location=Minneapolis%2C%20MN>