SUMMIT
WEALTH ADVOCATES
"Managing Wealth at the Highest Level"

Financial Advisor / Wealth Advocate Position

Fast growing, fee-only wealth management firm located in the Minneapolis / St. Paul area is looking for an experienced, full-time Financial Advisor / Wealth Advocate to join our team. This person will be responsible for working directly with clients as we address key areas of Wealth Management for them. Those areas include:

- Retirement planning
- Investment management & cash flow analysis
- Multi-year tax planning
- College planning
- Mortgage / debt analysis
- Insurance planning
- Estate planning
- Small business consulting

Responsibilities Include:

- Prepare for and participate in regular review meetings with wealth management clients
- Participation in new business development meetings including:
  - ❒ Prospective client meetings
  - ❒ Center of Influence meetings
  - ❒ Networking events
- Participation in the financial planning process including:
  - ❑ Client data gathering meeting
  - ❑ Preparation of comprehensive financial plan for prospective clients
  - ❑ Financial plan presentation and plan implementation
- Daily client service items including ongoing client requests via e-mail, telephone, mail, etc.
- Participate in writing and publishing of periodic articles and blogs
- Continuing education

Required Knowledge, Skills and Competencies:

- A bachelor's degree is required; degree emphasis in financial planning, finance or accounting / tax is a plus
- CFP® designation or the pursuit of CFP® designation required
- CPA license / Enrolled Agent designation and / or tax experience is a considerable plus
- A minimum of 3 years of industry experience
- The ability to understand complex financial information (tax returns, investment statements, life insurance policies, pension and annuity information, etc.) is essential
- The ability to provide a high level of client service in a calm, courteous and professional manner is a must. This includes frequent participation in client review meetings.
- Strong computer skills, including experience with Microsoft Office
- Experience with financial planning tools is a plus
- Excellent communication and multi-tasking abilities
- Confidence in dealing with clients; experience engaging with prospective and current customers would also be a considerable plus

Our compensation package includes a competitive base salary, with bonus potential, health and dental insurance, paid time off and retirement plan benefits. Long-term benefits could include promotion and an ownership share in SWA.

Summit Wealth Advocates, LLC is a Fee-Only Wealth Management Firm. SWA advises clients across the United States, managing assets in excess of $300 million. We are a rapidly growing Wealth Management firm looking for team members that want to grow with us. Please visit our website at www.summitwealthadvocates.com for more information about SWA.

Please forward your resume and salary expectations to Kay Strand at kstrand@summitwealthadvocates.com