



Wealth Manager

Accredited Investors Wealth Management® is currently seeking a client-focused, collaborative-individual to join the wealth management planning team within an industry-leading wealth management firm. The Wealth Manager role has responsibility for identifying and performing analysis of planning strategies and ensuring client deliverables and reports are developed reflecting these strategies in a timely, accurate and useful manner. Individuals in this role are responsible for participating and listening carefully in client and planning meetings to capture data and completing the analysis on an ongoing basis. The Wealth Manager role is an opportunity to learn and refine the fundamentals of Accredited Investors' model of wealth management within the supportive and mentoring environment of a team.

A successful candidate will be passionate about wealth management as well as continuous learning and have keen attention to detail.

Primary Responsibilities

- In collaboration with a Lead Wealth Manager, identify and perform analysis of planning strategies, risks, and opportunities related to each component of Accredited Investors Wealth Management Index™, including retirement planning, tax planning, estate planning, cash flow planning, asset protection, etc.
- Develop client deliverables and reports in a timely, accurate and informative manner
- Participate and listen carefully in client and other planning meetings and translate the discussions into a plan for data collection and analysis to help drive financial planning efforts
- Own implementation of client planning strategies
- Continuously stay in relationship with clients and understand their unique circumstances, connections, talents, interests, etc.
- Proactively lead a Strategic Planning Area (ex: tax planning), staying current on trends within the area and ensuring Accredited's planning tools and philosophy remain cutting edge

Required Knowledge, Skills and Abilities

- Ability to effectively balance a client-centric style while working within the Accredited model of wealth management
- Ability to work successfully within the Accredited Investors culture while driving results – high personal and professional integrity
- Ability to gain rapport, build trust and effectively engage Accredited's clients, outside advisors, and fellow team members
- Ability to conceptualize and think through complex financial and life scenarios comprehensively and with creativity

- Ability to frame client needs, goals and values into analyses and wealth management solutions
- Strong listening and communication skills within a complex matrix-structured organization and ability to work effectively within a client team
- Excellent organizational and time management skills; proven drive to consistently follow-through
- Creative problem solver, ability to anticipate needs and actively participate in a continuous improvement culture
- Personable and approachable with a positive attitude
- Self-disciplined with commitment to quality, attention to detail and accuracy
- Ability to receive and provide feedback in an effective way

Education and Experience

- Wealth management related experience or financial planning related degree
- CERTIFIED FINANCIAL PLANNING™ practitioner or on path to certification
- Strong proficiency with Microsoft Office, including Excel, Word and PowerPoint
- Preferred experience with Microsoft Dynamics CRM, Junxure, Salesforce, Redtail or similar CRM

Experience Accredited

Accredited Investors Wealth Management®, based in Edina, Minnesota, is a fee-only comprehensive Wealth Management firm. We serve high net worth clients using an individualized service model. Our clients value our strong level of attention to detail, responsiveness to their needs and professional style.

As a firm, in addition to serving our clients, we are engaged in community outreach and various green initiatives. Our employees enjoy a beautifully appointed facility, including a fitness center, state-of-the-art technology, and amenities that enhance our work environment. Development and training of our firm's talent is a top priority.

Accredited Investors Wealth Management® offers a competitive compensation and benefits package including medical; dental; disability coverage; a 401k plan with a generous employer match; life insurance; a marketplace-leading time-off allowance, including paid parental leave and paid volunteer time; and firm-wide profit sharing. Accredited was named one of the Top 150 Workplaces in Minnesota by the Star Tribune in 2020.

Accredited is committed to promoting diversity and inclusion in our hiring process and is proud to be an equal opportunity employer. We welcome qualified applicants without regard to race, color, religion, sex (including pregnancy, sexual orientation and gender identity or expression), national origin, genetics, disability, age, veteran status, and any other characteristic protected by federal, state or local laws.

For more information about our firm, please visit our website at Accredited.com.

Please direct your cover letter and resume to: resumes@accredited.com.