Flourish
WEALTH MANAGEMENT

POSTING – JUNE 2021

Wealth Manager

ABOUT FLOURISH

Flourish Wealth Management is a growing, independent, fee-only, boutique wealth management firm located in Edina, Minnesota. We provide comprehensive wealth management services integrating life planning with financial planning, including investments with an emphasis on impact and sustainable investing. As fiduciaries, our team is committed to putting our clients' best interests first which guides our decision-making and culture while building long-term, caring and trusted relationships. Flourish is committed to continued learning, personal development, and team building supported by an outside professional hired to help us learn about our individual strengths, communication skills, and develop opportunities to maximize our team-oriented culture. We learn from each other as a team in our bi-weekly lunch-and-learns focused on topics of interest and Diversity, Equity and Inclusion (DEI) themes.

JOB DESCRIPTION

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? Would you be excited to join an entrepreneurial environment that embraces new solutions and new technology?

We are looking for a Wealth Manager who embraces our values and is committed to helping our clients identify and achieve their personal and financial goals. The Wealth Manager will work closely with the Relationship Manager to prepare and deliver holistic and comprehensive financial planning to our clients, while working with the rest of the team to develop and refine processes that support the client experience. The owner of the firm has more than 25 years of wealth management experience including a commitment to supporting philanthropic giving, helping people and families in periods of transition, and expertise in divorce settlements. She is an author who contributes to a wide variety of publications in addition to frequent blog posts and maintaining a weekly mini podcast. The Wealth Manager will have the opportunity to support a variety of projects that support client solutions with flexibility to specialize as the firm grows.

Find out more about the company at flourishwealthmanagement.com

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Wealth Manager

RESPONSIBILITIES

- Create an exceptional client experience by understanding their values, personal money history, key relationships and life transitions.
- Design, present, and implement detailed, proactive financial planning solutions focused on retirement, investments, cash flow planning, multi-year tax planning, asset protection and estate planning.
- Prepare financial analysis for clients that consider their specific preferences, values, goals, and priorities with a vision to accomplish the client's personal and financial goals.
- Participate in client meetings with the delivery of financial planning recommendations alongside the Relationship Manager, with the plan to take over some client relationships over time.
- Develop the skills to lead comprehensive client meetings that discuss all phases of the wealth planning cycle to identify and educate clients about complex issues, connect to the emotional aspects of money, then offer creative solutions to help clients accomplish their goals.
- Anticipate and take the lead on day-to-day client needs.
- Coordinate with other team members and outside professionals to implement financial planning on behalf of clients and ensure the highest level of service.
- Integrate investment solutions with our Director of Investments through coordination of asset allocation, cash needs, charitable giving, and impact goals for ESG investments.
- Participate in building new client relationships in collaboration with strategic partners in the community.
- Commit to a culture that supports continuing education and team development at all levels with opportunity to write blogs and lead a knowledge area (i.e., tax planning, social security, charitable giving).
- Support a commitment to improving the firm, client, and team experience through strategic planning experience.
- Able to jump in and support others as the success of the entire firm relies on each person working together for shared goals.

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QUALIFICATIONS

- 5 years of experience in a wealth management, financial planning, personal tax-related position, and/or estate planning.
- CFP® designation will be favored. Obtaining the CFP® designation will be required of anyone who does not have it.
- Excellent written and verbal communication skills demonstrating professionalism and ability to connect on a personal level.
- Excellent client service and relationship management skills
- Curiosity, empathy and high emotional intelligence with clients, firm, team members and broader community.
- Attention to detail and team-player attitude
- Ability to lead, mentor and develop others
- Self-starter with a commitment to ongoing learning
- Solicits and provides feedback with growth personality
- Experience with our custodian and software is not required, but will be a plus: Schwab, Salesforce, MoneyGuide Pro, Orion, Sharefile

SALARY AND BENEFITS

- Base salary $85k to $100k plus Incentive compensation plan with a firm and individual component to payout
- This position has immediate room for mentoring and growth, and there will be an opportunity for Partnership for the right person down the road
- 401(k) plan with employer contribution
- Medical plan and Health Savings Account contribution

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SALARY AND BENEFITS CONT'D

- Employer paid long-term disability coverage
- Unlimited PTO plus bonus holiday week
- 10 paid company holidays
- Firmwide communications training and career development
- Bi-weekly education meetings focused on learning and Diversity Equity and Inclusion (DEI) initiatives
- Personalized development plans in coordination with outside resources
- Paid professional dues, continuing education, conferences, and training
- Hybrid working environment
- Paid time off for volunteer opportunities
- Time to Appreciate and Celebrate!

THE PROCESS

Qualified candidates will be invited to schedule a 15-30 minute phone interview conducted by our consultant (who is the hiring manager for this position), then an in-person interview. If there is mutual ground on which to move forward, candidates will be asked to take a Caliper and Kolbe assessment, and then a second in-person interview with the Flourish team. Successful candidates must pass a background and credit check.

PLEASE APPLY HERE:

https://leading-financial-advisory-firm.breezy.hr/p/b9fa2b25c201-wealth-manager

We are a woman-owned business and are committed to promoting diversity and inclusion in our hiring process, and we are proud to be an equal opportunity employer.

Find out more about the company at flourishwealthmanagement.com