Client Relationship Manager / Financial Planner

Why Joslin?

When you join Joslin Capital Advisors, LLC, you join one of the top independent, fee-only wealth management firms in the Puget Sound area. We are a cohesive team that works hard to give our clients exemplary counsel and service. Our clients are affluent individuals and families who stick with us throughout their lifetime and turn to us first for expert advice and guidance. Building deep client relationships is the foundation of our firm. You will find ample opportunities to develop professionally and contribute meaningfully here, in a work environment that is friendly, supportive and committed to success through excellence and growth. When you succeed, we succeed. To learn more about us, please visit our website at www.joslincapital.com

What we want

An experienced advisor who has the ambition to grow a firm and a matching track record. Our ideal candidate is someone with energy and drive, who is passionate about making a difference in our team and the lives of our clients. This is an excellent career opportunity to join a culturally collaborative team of learners who motivate and inspire each other.

Position overview

The client advisor is the firm's main point of contact with a select group of clients. This advisor is responsible for managing client relationships and formulating and implementing advice. He or she is also responsible for leading the firm's client expansion effort, in addition to day-to-day responsibilities that include generating and servicing new clients as well as servicing existing high-value clients. This advisor also works with, trains and supervises other staff in client service delivery.

Skills and experience

- Deep understanding of RIA firms and commitment to independent financial advice.
- Financial planning/wealth management acumen, judgment and experience.
- Strategic thinker, creative problem solver and competent decision maker.
- Demonstrated ability to drive execution and results.
- Outstanding executive communication skills—internal and external.
- Proven leader with strong coaching and mentoring skills.
- Passionate about helping new and existing clients.
- Enjoys business outreach efforts.
- Exhibits personal integrity and professional initiative.
- Reliable, follows through on commitments.
- Organized, detail-oriented, manages and prioritizes tasks.
- Committed to delivering accurate high quality work.
- Collaborative, works effectively with others.
- Flexible team player, adapts to change and open to new ideas.
- Committed to uphold firm's purpose, vision and values.

Duties and responsibilities

- Provide objective, unbiased financial advice to a diverse mix of clients through analysis of investment opportunities and client needs.
- Develop and manage client relationships, through client meetings and communications.
- Prepare for client meetings with a thorough review of all required paperwork, prior to meetings.
- Service clients through planning updates, portfolio changes and reviews, returns and identifying new opportunities.
- Manage client assets, including coordination of financial planning and wealth management (analysis, estate planning, tax strategies for assets under management and portfolio management).
- Cross-sell firm services.
- Deepen existing client relationships.
- Train and supervise other staff in client service delivery.
- Participate in community outreach, networking and marketing activities to drive new business.
- Identify, cultivate and track new opportunities for the firm.
- Leverage local centers of influence to extend referral network.
- Attend client and prospect events.

Benefits

- Competitive salary with bonus opportunities
- 401(k) plan with company contribution
- Health insurance
- PTO program
- Job training and career development
- Potential for long-term growth and ownership

Qualifications

- Bachelor's degree from an accredited college or university. Emphasis in business / finance / accounting strongly preferred.
- 5+ years of experience in investment management and/or financial advisory services with demonstrated ability to develop and manage plans and client relationships.
- CFP Designation (Preferred)
- Series 65 (preferred or obtained within first year)
- Experience with estate and tax planning, qualified retirement plans, and non-profit organizations.
- A working knowledge of:
  - Client Relationship Management (CRM) software, like Junxure Cloud.
  - Financial planning tools (MoneyGuide Pro, eMoney, PortfolioCenter/Tamarac).
  - Compliance requirements related to the securities and investment advisory industries.

If this job sounds like a good fit, we'd like to hear from you! We are an Equal Opportunity Employer, and provide a smoke-free, drug-free workplace.

To apply-

Please email cover letter and resume to info@joslincapital.com.