https://sales-executives.com/job/evp-financial-advisor-wealth-management/

EVP Financial Advisor

Hiring organization
Sales Executives

Employment Type
Full-time

Industry
Financial Planning

Job Location
Nashville, Tennessee

Date posted
October 1, 2024

Description

Exciting Opportunity with locally based wealth management company established in Nashville, Tennessee. Our client growth with high-wealth individuals has been due to an outstanding collaborative team with all areas handled in house. Providing their clients with high-quality investment ideas and listening to their clients needs and goals. This is an opportunity to work with a local firm that values each and every employee and be part of the dynamic team. Beautiful offices, cohesive culture and a direct line for you to the CEO and future advancement opportunities lead to a smart career move for the right candidate.

Summary of company:

Company is a leading Registered Investment Advisor (RIA) / Wealth Management firm, established in Middle Tennessee market for over 16 years. This team-driven firm provides comprehensive financial planning, investment management, tax strategies and estate planning services geared towards investment driven, highly accomplished clients. They focus on a client-centric approach, helping clients through life's transitions, committed to excellence, and fostering a professional, collaborative work environment

Responsibilities

The **Executive Vice President, Financial Advisor**, will play a pivotal role in the growth and success of the Company. Focus will be managing and expanding a portfolio of high-net-worth clients, providing expert financial advice, and driving the firm's strategic initiatives. Candidate will have a deep understanding of financial markets, strong client relationship skills, and a proven record of success in the wealth management industry.

Qualifications

Earned a Bachelor's degree in Finance, Economics, Business, or a related field. Advanced degree or certification (e.g., CFP, CFA, CPA) is required.
Established a minimum of 8-10 years of successful experience in financial advisory or wealth management roles, with a focus on high-net-worth clients. Exceptions may apply based on past achievements and the value of the candidate's book of business.
Built a proven record of client acquisition and retention, with a demonstrated ability to grow a book of business.
Achieved a deep knowledge of financial planning principles, investment management, and tax strategies.
Possess excellent interpersonal and communication skills, with the ability to build trust and rapport with clients.
Exhibit strong analytical and problem-solving skills, with attention to detail and a high degree of accuracy.
Demonstrate technical proficiency in financial planning software, Salesforce, and Microsoft Office Suite.

Job Benefits

Competitive base salary with annual performance-based bonuses.

Comprehensive benefits package, including health insurance, retirement plans, and professional development support.
Opportunities for career advancement and leadership within the firm.
Collaborative and supportive work environment (many aspects are performed in house such as research, tax evaluation, administration etc.)

Contacts

Apply now through our link.