Intro to the Wealth Manager Role

Woodson Wealth Management (WWM) seeks an experienced, Wealth Manager, CERTIFIED FINANCIAL PLANNER™ (5-10 Years of Experience) with an existing book of business to join its growing and highly productive FEE-ONLY wealth management practice. A successful applicant is self-motivated, has strong interpersonal and communication skills, demonstrates a history of personal success, values professional independence (emphasis on independence), maintains a high standard of ethics, and shows interest in business, finance, or entrepreneurial ventures.

This is a W-2, virtual role and the advisor can be located anywhere in the United States. This is also a partner-track role, with potential ownership and leadership opportunities within the firm. We are seeking a candidate that is passionate about working with Gen X and Gen Yers, and is motivated to help us continue to grow, while enjoying the benefits that come with that work – in a truly independent environment.

WWM is an equal opportunity employer with a commitment to fostering diversity, equality and inclusion among its employees and clients.

Our Ideal Candidate

- Must have 5-10 years of Financial Experience
- Bachelors or Masters Degrees Preferred
- Must have securities experience (5 years minimum)
- Must have a portable, existing book of business ($20 million+ Required)
- Must have FINRA Series 65 or 66
- CFP® Designation Required
- Very comfortable with adopting technology and trying new things
- Approaches this opportunity as such, and not just a "job"
- Advanced emotional intelligence, people skills and ability to actively listen
- Excellent written and verbal communication skills
- Organized and process-driven
- Takes ownership in role and works to improve processes and develop new ideas independently
- Wants to live a non-traditional lifestyle (flexible schedule, remote work, sabbatical, etc.)
- Must be able to pass Background Check

Job Responsibilities

- Provide expert guidance and innovative solutions for the comprehensive planning needs of individuals and businesses in the areas of retirement planning and investment services, estate planning, business planning, education funding, and employee benefits.
- Strive to understand their clients' goals and visions to develop holistic financial solutions that put their clients on a path to financial success.
- Maintain flexibility to build their book while receiving support from our firm's exceptional network of financial specialists, training and educational programs, and mentoring opportunities.

Seniority Level

- Mid-Level Financial Planner

Industry

- Financial Services
- Marketing & Advertising

Employment Type

- Full-time

Job Functions

- Financial Planning
- Business Development
- Sales
- Marketing

We are an equal opportunity employer. We do not discriminate on the basis of race, creed, color, national origin, religion, sex, age, veteran status, disability, genetic information, gender identity or any other protected class.