<u>Associate Wealth Advisor</u>

Come join us at one of the fastest growing wealth management firms in Utah!

At Solidarity Wealth, we are unified in ensuring client success through our independent, fee-only wealth management and multi-family office. We focus on diligently listening to create trusted relationships with our clients to allow them to focus on what is important.

Our team is comprised of individuals committed to listening first and responding second. As such, we look for individuals who are dedicated, hardworking, and ready to take initiative.

Position Summary:

A successful candidate will be entrepreneurial, able to operate both independently and collaboratively, and must be comfortable building advisory relationships with potential clients and assisting firm business development strategies with limited direction. This role is ideal for those who wish to develop client advisory skills and long-term client relationships under the guidance and mentorship of an experienced Wealth Advisor team. Externally, you will partner with leading attorneys and accountants to coordinate a comprehensive financial, tax, and estate plan tailored to meet each client's unique objectives.

The ideal candidate will reinforce and advance Solidarity Wealth's exceptional client experience through being a trusted advisor and will have demonstrated ability to build long-term advisory relationships.

Principal Responsibilities:

- Build a practice within the firm with long-term client relationships and serve as the primary trusted advisor to the firm's high net worth clients while assisting the firm in onboarding new client relationships.
- Develop new long-term client relationships as a trusted advisor and fiduciary to clients and lead certain firm business development activities.
- Provide objective, unbiased financial advice to a diverse mix of clients and potential clients.
- Review and prepare in-depth summaries of clients advanced estate, asset protection, and tax plans.
- Build and continue strong relationships to retain existing clients.
- Actively participate and network in professional organizations and community activities.
- Seek and grow knowledge of investments, financial planning, tax planning, estate planning, etc. through continuing education and certifications.

Skills & Experience:

- Bachelor's degree.
- Currently hold or pursuing certifications like a CPA, CFA, CFP, CIMA, CPWA, etc.
- Minimum 3 years of experience in a financial service, accounting, law firm, or other organization that provided relevant experience.
- Series 65 or willingness to obtain.
- Demonstrated success in building long-term client relationships, maintaining client relationships, and integrating with key outside partners.
- Demonstrated ability and commitment to goals-based planning and advice.

- Exceptional communication skills.
- High proficiency in MS Office, CRM systems (such as Salesforce), financial planning software (such as Right Capital), and the ability to utilize new technology with ease.
- Ability to maintain professional image and project our values and culture with clients, colleagues, and the community.
- Exceptional organizational and time management skills.
- Extreme confidentiality in dealing with client information and good professional judgment.
- Confident self-starter who can be successful with minimal supervision and enjoys a fast-paced environment.
- Willingness to learn and assist where needed.

Not open to a remote position.
Solidarity Wealth is an equal opportunity employer where we invest in our employees through:
Competitive base salary and bonus structure.
Employer paid premium for health/dental/vision benefits.
Employer paid education and certification opportunities available.
Generous Paid Time Off.
And more…

Apply at https://www.linkedin.com/company/solidarity-wealth

Financial Planner / Certified Financial Planner (CFP)

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Our team is comprised of individuals committed to listening first and responding second. As such, we look for individuals who are dedicated, hardworking, and ready to take initiative. This position offers the opportunity to grow into an Associate Wealth Advisor based on successful performance.

Position Summary:

This position will be focused on sophisticated, goal-based wealth planning for successful families. The Financial Planner will assist the lead advisors in reviewing, analyzing, and delivering financial and estate planning support to clients as an integral member of our client experience team. The Financial Planner will be responsible for managing the financial and estate planning workflow, serving successful families by preparing for meetings, developing proposals and presentation materials, and dispensing financial planning advice.

The Financial Planner needs to have a strong command of estate planning, tax planning, employee benefits planning, and insurance planning. The ideal candidate will reinforce and advance Solidarity Wealth's exceptional client experience through being a trusted advisor and fiduciary to clients and a strong team player.

Principal Responsibilities:

- Support Wealth Advisors and Client Experience Team with client meeting preparation and follow up activities.
- Analyze, draft, edit and deliver comprehensive financial plans to clients.
- Demonstrate holistic knowledge of goal-based planning by preparing and presenting solutions for all types of financial and estate planning.
- Assist in onboarding new clients by owning the financial planning process.
- Review and prepare in-depth summaries of clients advanced estate, asset protection, and tax plans.
- Build and continue strong relationships to retain existing clients.
- Maintain updated knowledge of regulations, tax laws, and financial planning techniques.

Skills & Experience:

- Bachelor's degree in finance, accounting, or business-related field required.
- Current CFP®, CFP® candidate, or pursuing CFP® certification (or CPA designation).
- Minimum 3 years of experience in financial services or tax accounting, preferably as a financial planner.
- Series 63 / 65 or 66 required.
- Exceptional communication skills.
- Technical and analytical training and experience in financial planning.
- High proficiency in MS Office, CRM systems (such as Salesforce), financial planning software (such as Right Capital), and the ability to utilize new technology with ease.
- Ability to maintain professional image and project our values and culture with clients, colleagues, and the community.
- Exceptional organizational and time management skills.
- Extreme confidentiality in dealing with client information.
- Fanatical attention to detail and excellent follow-through.
- Strong collaboration skills and adept at building relationships with clients, prospective clients, and team members.
- Confident self-starter who can be successful with minimal supervision and enjoys a fast-paced environment.
- Willingness to learn and assist where needed.

Not open to a remote position.

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