Position: Associate Advisor

Compensation:

$75,000 Base Salary (or $25/hour for part time work while going to school)

$15,000 Target Bonus (20% of Base Salary)

Fully Paid Health Insurance

401(k) Match (Dollar-for-Dollar up to 6%)

Conference Budget ($2,500 annually)

Expenses covered for CFP® Prep and Licensing (up to $2,500)

Open vacation policy

Company Description:

Medicus Wealth Planning is a fee-only financial planning firm in Draper, UT.

We manage roughly $100 million in AUM for 140 households. In addition to wealth management, we offer hourly financial planning services.

We currently have no defined niche that we serve but are exploring the possibility of "niching" to streamline our processes and marketing going forward.

Position Description:

The Associate Advisor will play an important role in every aspect of the business. Because we're small you'll get to be a financial planner, a technical matter/software expert, a marketer, an admin, and an assistant compliance officer.

Financial Planning Responsibilities… Support the lead advisor and existing clients in keeping their financial plan up to date, finding new ways to add value in cash flow management, taxes, insurance, investments, and other parts of their financial plan, support and lead roles in hourly financial planning, improve the current financial planning process and deliverables, spearhead and take the lead role in potentially adding tax prep to a select number of clients.

Technical Expert Responsibilities… Become an expert in our technology stack (Advyzon, eMoney, Income Lab, Holistiplan, Fidelity Wealthscape, Maximize My Social Security, yCharts, Calendly, Smart RIA, Allocate Smartly, Microsoft Office, Zoom, and Canva) and continually monitor and make recommendations on new technology, attend webinars and training to reinforce and expand your knowledge of the technology we use, attend industry conferences to network and find new ideas to improve our business and help our clients, stay up-to-date on tax and retirement law, research and make recommendations on how to improve our investment philosophy and client portfolios.

Marketing… We've mainly grown through referrals, third-party websites like NAPFA, and google searches that land people on our website. We need help establishing and implementing a simple but consistent marketing plan. You'll need to learn how to manage our website, write effective and entertaining posts, potentially learn to use video/podcasting recording equipment, run social media accounts, etc.

Admin… Advances in technology have reduced the need for a full-time admin, and so we take a team approach in answering phones and greeting clients, filling out paperwork, managing office supplies, etc.

Assistant Compliance Officer… We use a do-it-yourself compliance system called Smart RIA that gives us checklists and reminders to ensure we're compliant with state and federal regulations. You will take the lead role in following the checklists and weekly tasks to ensure we're compliant and would be overseen by the Chief Compliance Officer.

This isn't an exhaustive list of all your responsibilities. Bottom line, you need to be ready and willing to do everything to ensure the success of the clients and our business.

Career Track:

We're not Fidelity or Vanguard, a billion-dollar RIA, or a multi-partner firm so the career track may not be defined as you like.

The intention is that you'll be happy and as the business grows so will your importance to the company, responsibilities, and compensation.

We will have discussions around where you see yourself in 1, 3, 5 and 10 years and will build a customized career path for you, monitor it, and update it as needed.

I want there to be an open line of communication at all times.

We envision the Associate Advisor growing into a lead role and becoming the eventual succession plan for the owner.

Hiring Process:

Part I: If you're interested send me an email at kevin@medicuswp.com with the following:

- A PDF version of your resume.
- A short video or email introducing yourself (I want to hear about your interests, hobbies, why you're interested in the profession, and this job in particular).

I'll respond to each submission to confirm I received it.

Part II: After reviewing your submission I'll email you to let you know if I'd like to set up an interview. Plan on 15 minutes for this interview, most of it will be getting to know you a little bit better and allowing you to ask any questions you have about the position, the company, or me.

Part III: We'll do an assessment on the five general responsibilities listed above (financial planning, technical expertise, marketing, admin, and compliance). I'm not looking for someone who is already a pro in all of these, but I want to assess your abilities and potentials.

Part IV: We'll set up a time to go to lunch, on me. At this point, I'd like to get to know you better on a personal level.

Part V: I'll decide on the final candidate and email the job offer.