Wealth Management Specialist - Special Needs Financial Planner

Location: Hybrid - Remote with In Office Days

Salary: $104,000 to $121,000 + Incentive Compensation

About Strategy West Financial

Strategy West Financial provides financial solutions for individuals at all stages of life. Our ultimate goal is to help our clients and their loved ones be financially confident. Until the recent beta test, we only offered insurance-based solutions. However, with our extensive client base, we have made the strategic decision to implement wealth management solutions for our clientele. Our initial beta testing of this strategy has proven highly successful and we are now seeking to hire a full-time Wealth Management Specialist to our team.

In addition to our Wealth Management Specialist Role, we have found a special opportunity to expand our operations within the Special Needs Financial Planning space. This is a unique opportunity to combine ones expertise for financial planning with a passion for helping others who have been entrusted with a loved one with special needs.

About the Position

In this role, you'll split your time between two types of clientele. The first type of client will be those referred to us by our partner Wealth Factory, which works with business owners and professionals with investible assets. The second type of client will be those families who have children with special needs and provide them with special needs planning solutions. You'll be working with a small team of ten in a hybrid work environment where part of the team is remote and the other part in the office. You'll have flexible working hours and the opportunity to help build from the ground up both the wealth management and special needs planning departments.

Ideal Candidate

The ideal candidate will be someone who has experience as a financial planner and is familiar with Fee-Based Financial Planning. They will have the option to choose to either work remotely or have a private office with an excellent view in our headquarters in Lehi, Utah. They ideally have an entrepreneurial spirit and are looking to build something from scratch with the help of great managers and experienced mentors. Given that half the clients will be families with special needs, a connection to the special needs community will be a huge plus.

Qualifications

- 4+ Years Experience in the financial services industry
- ChSNC® certified or willing to complete certification
- Must have a Series 65 or 66 license and proper state registrations.
- Must have appropriate credentials for FINRA Series 7 and 63 and a state insurance license.
- Professional credentials such as Certified Financial Planner® are a plus.
- Proven ability in developing connections, identifying requirements, and suggesting solutions to help clients achieve their goals.
- Impressive talent in conveying complex resolutions to a well-informed clientele, fostering a bond and authenticity.
- Proficiency in recommending diverse investment approaches and ensuring that communication prioritizes clients' best interests is a hallmark of effective wealth management.

- The qualities of being coachable, collaborative, and curious are indispensable for anyone aspiring to be an effective team player.
- Dedicated to providing unparalleled customer service with a passion for seeing customers succeed.
- Energized by achieving success and a knack for finding answers, you strive to exceed the demands of your clients.
- Broad understanding of asset allocation strategies.
- Effective communication skills are key to fostering these connections.
- Ability to work remotely with minimal supervision and communicate effectively with team and manager.
- **An affinity for special needs or a connection to the special needs community is a plus.**

Responsibilities

- In the Wealth Management Specialist role, you will have the opportunity to build meaningful connections with clients and families in one-on-one meetings.
- In addition to meeting with clients one one-on-one, this role will have multiple opportunities to present and teach investment concepts in a group setting in person or virtually through webinars.
- Our primary objective is to provide our clients with a breadth of educational information and present a range of investment solutions that meet their current and future needs.
- Our secondary objective is to provide financial planning services to families with special needs children.

Benefits

The company advocates for being comprehensive in its approach to life, which is why it has developed a competitive total rewards package, including a stable base salary, to acknowledge the achievements of its staff.

The successful candidate for this position can expect to earn an annual salary between $104,000 to $121,000 + Incentive compensation based on prior experience and overall fit.

Furthermore, there is an opportunity for additional pay through incentives or bonuses based on their performance and achievements.

To apply send your resume to bradymurray@financialguide.com