CROSSPOINT WEALTH PARTNERS

NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP

Remote Financial Planning Residency Opening

Overview

CrossPoint Wealth Partners is seeking a Resident for summer 2025 to learn financial planning, operations, and client relationship management. Our three-year Residency Program aims to maximize academic and experiential learning, tailored to the Resident's interests and strengths, aiding in achieving the CFP® designation. Successful Residents can choose to join CrossPoint permanently, secure a top job elsewhere, or start their own firm.

About Us

CrossPoint Wealth Partners, a fee-based hybrid firm, manages over $500M in assets, specializing in retirement planning. We serve over 300 physician families and focus on educating future planners through rigorous Residency and Internship Programs. Our team, co-founded by Jarrod C. Markley and Rainer M. Schlichtherle, includes 5 CFP® Professionals and 2 current Residents. Most of our work is virtual, though we have offices in Charlottesville and Richmond, Virginia.

Program Details

The Residency program offers a broad curriculum and adaptable path all while gaining experience in all 7 elements of the personal financial planning process. Key rotations include:

Planning Support Advisor (Year 1)

- Observe and document client meetings
- Update client files and software
- Participate in new-client processes
- Create client deliverables
- Engage in trading, plan implementation, and account maintenance

Lead Planner (Years 2 & 3)

- Become a Financial Planner
- Manage client meetings and relationships
- Create financial plans
- Present educational content
- Train new residents and interns
- Learn business management skills

Qualifications

- Bachelor's degree in personal finance or financial planning
- Prepared to study for and pass the CFP® exam within the first year
- Ability to obtain necessary insurance and securities licenses
- Excellent communication skills
- Attention to detail and urgency
- Preferably located on the East Coast, full-time during EST hours

Benefits

- Post-graduate yearly (PGY) stipend:
  - PGY 1: $60,185
  - PGY 2: $66,323
  - PGY 3: $72,642
- Health, dental, and vision insurance (80% employer-paid)
- Disability and life insurance
- Retirement: 401(k)/Roth 401(k) with 4% match, plus profit share
- Employer-paid professional designations and memberships
- CFP® exam reimbursement
- Flexible paid time-off

To Apply

Complete a one-hour assessment and a one-minute video application. Click here to apply.

Send resumes to richard.grant@nm.com