Wealth Advisor
Career Opportunity

WealthPoint Advisors

WealthPoint Advisors provides fee-only wealth management and financial planning services to high net-worth individuals, retirement plans, corporations, and non-profit organizations.

Located in Indianapolis, IN (Castleton), we are looking to add a proven, committed, and driven individual to our growing firm.

Position Description

The Wealth Advisor is a full-time client relationship management position that oversees and supervises existing WealthPoint client relationships either working in conjunction with a Lead Wealth Advisor or as the sole Advisor. The Wealth Advisor is responsible for formulating and implementing advice to clients in a team environment. Advice may cover many areas of wealth management, including retirement, tax, insurance, or estate planning.

Duties and Responsibilities

The Wealth Advisor can expect to focus in the following areas:

- Develop financial and investment plans
- Implement and monitor investment plans
- Lead or present component(s) in client meetings
- Advise employees of 401(k) plan business clients
- Research investments complying with due diligence requirements
- Seek new business revenue through opportunities with existing clients, and acquiring new clients
- Coordinate and communicate with attorneys, CPAs, external advisors
- Communicate with custodians and third-party providers

Qualifications

The Wealth Advisor position typically requires the following qualifications:

- Bachelor's Degree from an accredited college or university
- Finance or Accounting professional with 3-7 years of relevant work experience
- CFP® or CPA designation
- Series 65 License in good standing
- Travel availability < 5%
- Proficiency with MS Word, Excel, PowerPoint, and Outlook
- Detail and process oriented
- Accurate, organized, and able to set priorities
- The ability to manage deadlines and multiple responsibilities
- Putting client's needs first and providing excellent client service
- Strong written and verbal communication skills
- Self-starter, takes initiative
- Team player, collaborative, able to work with and through others
- Desire/ability to work successfully in a small company environment

Salary and Benefits

Pay/benefits are competitive based on industry standards, experience and capabilities.

Benefits may include: 401(k) with company matching program, paid vacation, paid holidays, and paid health insurance. Full financial support may be provided for professional accreditation/continuing education requirements and other education/ training opportunities.

For confidential consideration, please forward your resume to: pstephenson@wealthpointadv.com
Pamela Stephenson, WealthPoint Advisors, LLC, 8520 Allison Point Blvd, Suite 230, Indianapolis IN 46250

WEALTHPOINT ADVISORS, LLC IS AN EQUAL-OPPORTUNITY EMPLOYER