

Associate Wealth Planning Advisor

Benchmark Wealth Management is a boutique wealth management firm located in Cincinnati, OH. We are a growing Midwest firm with clients primarily located in the Midwest and Southeast. As a private advisory firm, we focus on providing comprehensive wealth management services to affluent individuals and families. To learn more about Benchmark Wealth Management, please go to our website at www.benchmark-wealth.com.

To support our continued growth, we are looking to add to our advisory and planning team. Our current openings include an Associate Wealth Management Advisor and an Associate Wealth Planning Advisor.

As an Associate Wealth Planning Advisor, you would provide financial planning support for a Wealth Management team. As part of a wealth management team, you will be responsible for serving existing clients and onboarding new clients. Each member of the team will collaborate with you on a regular basis and, in support of your career, act as a coach, teacher, and mentor to develop your skills and leverage your strengths.

In this role, you will be exposed to all aspects of financial planning, including retirement, succession, legacy, and charitable planning. In addition, you will serve a wide array of clients with complex financial issues, including Business Owners, Professional Athletes, and Executives.

Position Responsibilities:

- Primary role is to support the sales and service process while implementing the Benchmark Financial Planning process
- The ability to establish and develop strong relationships with clients and team members
- To provide clients with consistent, exceptional service on a day-to-day basis.
- Coordinate with Advisors to efficiently gather the data necessary to construct Foundational, Comprehensive, Legacy, and Business Succession plans.
- Participates in the development, delivery, and implementation of customized wealth plans based upon each client's facts and circumstances.
- Exhibit excellent listening and interview skills necessary to assess client needs, goals, and aspirations
- Follow up with clients to effectively gather, confirm and validate data received
- Creative and consistent support of idea generation, deliverables, implementation timelines, and follow-up.
- Supports the delivery of wealth plans to clients in a clear and understandable manner
- Develops proficiency in the use of e-Money, Vanilla, Tamarac, Holistiplan, Vizeo, and other planning tools and resources
- Support development of Financial Wellness Workshops for Professional Athletes, Inner city youth groups, and the children of our clients
- Career path to include Wealth Management Advisor or Advanced Planning Advisor tracks

Qualifications:

Dedication to integrity, professionalism, and confidentiality

Strong willingness to learn

Bachelor's degree required

CFP® designation or desire to obtain one

Knowledge of the securities industry, financial planning, and investment management

Familiarization with financial concepts, investment products, portfolio analysis, goal setting, and cash flow

Strong interpersonal skills as well as verbal and written communication skills

Able to identify, meet, and follow through with client's needs and requirements

Must be a self-starter, quick learner, and a problem solver with strong attention to detail

Must demonstrate excellence in organization and time management skills

Able to prioritize multiple tasks then perform them efficiently and accurately

Emotionally intelligent, strong analytical skills, and motivated by client satisfaction

Proficient in Microsoft Office applications

Experience with CRM systems is preferred

Benefits:

Salary commensurate with experience, education, and ability

Employer-sponsored health insurance

401k Plan

Reimbursement for CFP® exam prep course and CFP® Exam fee, if not yet taken

Job Type: Full-time with Flextime and Remote work available

Client development and retention compensation available

Additional Compensation: Bonuses

Contact: David Eltringham, Managing Director deltringham@benchmark-wealth.com