Cedar Brook
GROUP
CULTIVATE TODAY.™

Cedar Brook Group, located in Mayfield Heights, Ohio, is looking for an experienced financial advisor to service an existing book of business of a senior advisor. In this role, the advisor will integrate with senior advisor's book of business as part of a succession plan.

The Advisor is responsible for developing and executing on high-net-worth client relationship, financial and investment plans to provide an exceptional client experience. The position is client-facing with the objectives of enriching lives while earning trust, building plans and delivering results. In this role, the advisor may be the primary client relationship manager or may work in a support role with the lead advisor, depending on individual client circumstances.

Responsibilities

- Serve as a primary point of contact for client relationships.
- Manage the day-to-day aspects of client engagements.
- Identify and recommend appropriate asset management, financial and estate planning advice to deliver a great client experience.
- Proactively maintain client relationships through excellent client service.
- Lead in the collection of financial planning data, while working with the Financial Planning Department to develop financial plans.
- Display professional communication skills with responses to clients, advisors, and team members by phone, email, and written communications.
- Utilize Redtail for documentation and processing of client data, tasks, financial accounts and policy adherence.
- Supervise and coordinate the preparation of meeting materials, including agendas, planning analyses, and investment materials.
- Draft summary emails following client meetings, clarifying understandings and outlining steps for implementation.
- Manage meeting follow up, including coordination of internal and external resources; responsible for making sure client objectives are completed.
- Lead client meetings.

- Complete client meeting notes and follow up tasks.
- Perform other duties and responsibilities, as assigned.
- Identify additional planning or asset management opportunities in existing client relationships.

Requirements

- Bachelor's degree required in Economics, Finance or related field
- Minimum three years of experience in Client Advisory role, five or more years preferred
- Experience with working with high-net-worth clientele
- Technical knowledge of all aspects of comprehensive financial planning; including: cash management, income tax planning, insurance, education planning, retirement planning, estate planning, and risk management
- Competent with Microsoft Office suite and Client Relationship Management system such as Redtail

Competencies

- Strong organization and time management skills; effectively able to handle multiple projects and prioritize to meet established deadlines
- Excellent communication skills, both written and verbal
- Ability to find creative solutions to problems, devise strategies, and propose solutions
- Self-starter and able to perform job duties with little supervision
- Client service oriented, with the ability to work independently as well as collaborate with team members
- Commitment to efficiently and effectively using provided technology in the service of clients and engagement of colleagues

Apply

- Email resume to Christine Ament at cament@cedarbrookfinancial.com.