**Lead/Senior Wealth Advisor with 5+ Years Experience & CFP**

**Starting Compensation is $75,000 to $150,000 –** based upon experience, certifications/licenses, and client responsibilities that can be assigned. Compensation will be adjusted if an advisor is bringing clients to the firm.

We are a high growth, fee-based Financial Planning and Wealth Management Firm that has excellent client retention, continuous prospective clients, and who is committed to making a positive impact in the lives of our team members, clients, and the communities we serve. As a leading RIA, and we are looking for top notch individuals to partner with that want to grow to the next level. We are invested in each team member's growth and success and have career paths, company paid development, a laid out path to equity, and a very talented team that is sincerely interested in helping others achieve their goals. We have 5 partners in our firm currently, and we are looking to add partners.

Fidato Wealth has been named to:

- Financial Advisor's Top Registered Investment Advisers for 6 years in a row
- WealthManagement.com's Thrive Award
- WealthManagement.com's RIA Edge for the fastest growing advisors nationally and in the state.
- The founding principal and other partners have been featured in The Wall Street Journal, CNBC, Barron's, Fox 8, and other national and local venues.

This position is ideal for someone with:

- 5+ years RIA advisory experience
- 2+ years of experience leading client relationships
- Wants to team up with an industry leader who provides comprehensive and world class Financial Planning and Wealth Management to clients
- Wants to be part of a Fee Based RIA, and have a Fiduciary duty to their clients across all advice
- Wants to grow, work hard, and put the time in needed to be very successful

- Wants a virtually uncapped income opportunity via a compensation plan that rewards advisors for both retaining and bringing on new clients.
- Wants a laid out path to partnership. Fidato has 5 firm partners, and we welcome talented team players who want to earn partnership.
- Is a CERTFIED FINANCIAL PLANNER PROFESSIONAL™
- Wants to work within a great team of people in a positive environment towards a common goal
- Wants to lead existing relationships, and be assigned qualified and warm prospective clients who have reached out to the firm.
- Wants to do participate in development activities that are time tested with proven results. Prospective clients are provided as we have ongoing prospective client inquiries. Our innovative approach to delivering high impact Wealth Management is an irresistible offer to prospective high net worth clients, and you have a support team to deliver it.

We were founded in 2008 on our core value - our Fiduciary duty. We prescribe to and were founded on industry best practices, while working with one of the most sought-after industry consultants who works with the best of the best RIA firms nationally. We have excellent systems, technology, institutional investments, and strategic relationships, all to put us in a position to provide proactive wealth management that is second to none. We are looking to partner with others who are an excellent cultural fit.

**Summary of Initial Responsibilities:**

- Leads relationships with the current lead advisor as clients are transitioned to the new advisor, while learning how Fidato delivers high impact wealth management
- Leads client relationships independently after first 90 days.
- Assigned prospective clients who have reached out to the firm, and leads prospective client appointments with other firm partners
- Participates in business development the firm has conducted for over 10 years, such as educational events, webinars, podcasts, and corporate specific events for their executives
- Prepares reports and financial analysis for client meetings.
- Coordinates with clients to ensure their planning objectives are completed successfully and proactively.
- Communicates professionally with clients in writing, on the phone, video conference calls, and in person.
- Supports the company's strategic initiatives.
- Successfully works with and utilizes their Financial Planning Specialist and Client Service Specialist that supports them.
- Performs other duties and projects as needed.

**Job Requirements and Qualifications:**

- Action driven with attention to detail and persistent follow-up
- Desires to grow, be very successful, and put the work in needed
- Bachelor's degree, preferably in a related field
- 5 Years RIA Advisory Experience
- 2 Years Leading Client Relationships
- Ability to work independently with minimal supervision
- Must have excellent oral and written communication skills
- Candidate must be a CERTFIED FINANCIAL PLANNER PROFESSIONAL™
- Ohio Life and Health insurance license is a plus, but not required

**Compensation**

Total starting compensation ranges from $75,000 to $150,000, based upon experience, certifications/licenses, and client responsibilities that can be assigned. This position makes up to $250,000, and Partners have the ability to make $250K plus. Compensation will be adjusted if an advisor is bringing clients to the firm. Compensation consists of salary, incentive pay, and profit sharing.

**Benefits**

We have an outstanding benefits package which includes: Medical, Dental, R/X & Vision Insurance, HSA, 401k with Profit Sharing, Cash Balance Plan, Company Paid Disability Insurance, Flexible Time Off, 5 Week Sabbatical After Every 5 Years of Service, Flex Time, Company Paid Development Programs, and Paid Certifications and/or Licensing. Benefits also include a positive work environment and great company culture.

**Hybrid Work Option**

New employees work in the office due to the training required. We do offer a hybrid work option for employees, once they are fully trained, that allows team members to work up to 2 days per week from home, provided that firm and individual goals are met.

**Next Steps**

If you are driven to succeed and are looking to be an integral part of an outstanding company, we would enjoy hearing from you. **Submit your resume today to [tony@fidatowealth.com](mailto:tony@fidatowealth.com)!**

Job Type: Full-time

Salary: $75,000.00 - $150,000.00 per year

Benefits:

- 401(k)

- 401(k) matching
- Dental insurance
- Flexible schedule
- Health insurance
- Health savings account
- Paid time off
- Parental leave
- Professional development assistance
- Retirement plan
- Vision insurance

Physical setting:

- Office

Schedule:

- Day shift

Education:

- Bachelor's (Required)

Experience:

- Advisory: 5 years (Required)
- Leading Client Relationships: 2 years (Required)

License/Certification:

- Certified Financial Planner (CFP®) (Required)

Work Location: One location