**Sample Job Description: Wealth Plan Specialist**

*IMPORTANT: These job descriptions are samples only; customize each section to your firm and the specific role.*

**WHO WE ARE:**

{Company Name}, a growing wealth management firm, is seeking a Wealth Plan Specialist to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

*Insert here: any awards or accolades the firm or owner has received. For instance, “Become a member of one of the most respected teams in the wealth management industry. XYZ Wealth Management Group was recently named #25 on Registered Rep’s list of the Top 100 Advisors.”*

*Insert here: any unique aspects of your culture, such as company core values and how your culture looks in real life.*

Our mission at {Company Name} is to {Insert Company Mission Statement}. If you have a relentless, burning desire to succeed and share our vision, then we would love to hear from you!

**WHO WE WANT:**

The Wealth Plan Specialist is responsible for the creation and maintenance of the Comprehensive Financial Plans for the firm’s clients. This individual focuses on client needs in the areas of cash flow, retirement planning, estate planning, education planning, and major purchase planning.

**WHAT TO EXPECT:**

* Demonstrates the Wealth Plan software to potential clients.
* Prepares and mails introduction packages with an engagement letter, document request, and Wealth Questionnaire.
* Enters client information into Comprehensive Financial Planning Software and generates wealth plans.
* Assists clients in aggregating their accounts into the system.
* Develops a close, long-term relationship with wealth plan clients to understand their current circumstances and future needs or wishes.
* Creates PowerPoint presentations summarizing the Wealth Plans for client meetings.
* Provides annual reviews.
* Manages clients’ individual wealth planning websites to maintain current information.
* Reviews and modifies systems to enhance the wealth planning experience.
* Continually looks for ways to improve the wealth planning process.
* Develops and maintains written systems of all wealth planning activities.
* Performs other duties as assigned.

**WHAT YOU NEED:**

* Bachelor’s degree in business administration, accounting, finance, or similar field of study.
* Minimum of three years of financial planning, wealth management, or public accounting experience. Ideally, two to three years of experience in a financial planning firm.
* Professional designation such as CFP or CPA highly desirable.
* Requires:
	+ Extreme attention to detail.
	+ Strong analytical and communication skills.
	+ Excellent interpersonal skills.
	+ Excellent attitude and an extraordinary client service orientation.
	+ A genuine interest in serving and caring for other people.
	+ Excellent organizational and time management skills.
	+ A burning desire to succeed.
	+ An ability to handle multiple tasks and handle stress.
	+ Proficiency with Microsoft Office Suite.
* Attendance is an essential function.
* Salary is commensurate with experience.

In exchange for your expertise, we offer a base salary, bonus potential, 401(k) plus matching, health benefits, a potential for career growth, and a great working environment. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational and focused on healthy living. Smokers need not apply. For more information about our company, please visit our website {Insert Company Website}.

If you’re interested in this opportunity, please send your resume and letter of interest to {Name and Email Address}.

We are an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, protected veteran status, or any other characteristic protected by law.