

Wealth Manager/Financial Planner

Location: Charlotte, NC

Description:

Located in the southeast, this firm is a hybrid somewhere between a wire-house and an independent firm. They manage \$6 billion in assets. The position supports 3 high net worth wealth advisors, one of whom will be retiring soon. The candidate will be managing an existing \$50 million book of business made up of emerging worth accounts ranging from \$100k to \$1M+ of investable assets. In addition to managing and helping grow the existing book, the applicant will be responsible for servicing new business that comes from the company's existing 401(k) rollover accounts or from the firm executives who oversee those 401(k) accounts.

Qualifications:

- Clean U4
- CFP® Designation
- Desire to be client facing
- Deep knowledge of financial planning
- Ability to come up with client programming

Compensation:

Base salary: \$90k to \$110k with a 2% - 4% bonus. However, if the candidate wants to bring their existing book of business with them, he or she can choose between straight commission right away and converting to the commission program anytime they are ready.

Any qualified candidate who is interested in the position can either call Ron Lieberman at 954-796-8900 ext. 1 or kindly send him an email to ron@winstondunn.com