Position Title: Relationship Manager
Company: Prentice Wealth Management, LLC, 110 Linden Oaks, Suite F, Rochester, NY 14625
Job Type: Full Time Employee

Who We Are: Prentice Wealth Management, LLC is a leading Wealth Management firm headquartered in Rochester, NY. Established in 2008, it is a growing RIA with extensive expertise in financial planning and wealth management for individuals and business owners.

Position Summary: The Relationship Manager will report directly to the Managing Partner, having a primary duty of enhancing existing PWM client relationships. The Relationship Manager will service an existing book of business and transition to lead the client relationship, providing proactive service throughout all phases of client relationship management.

Position Responsibilities:

- Serve as the lead relationship manager in high-net worth client relationships by providing proactive client solutions and service.
- Coach clients on all aspects of their financial plan including insurance, college planning, investment strategy and retirement planning.
- Support business owners in key-man strategies related to risk mitigation and succession planning of their business.
- Play a key role in continuing and maintaining deep, meaningful client relationships.
- Ability to create an atmosphere of excellence in client service with a passion for delivering memorable experiences for our clients.
- Demonstrate strong knowledge in investment strategy and overall money management with the ability to work with internal analysts in developing models and strategies for clients.
- Communicate the company's investment philosophy in a factual and understandable fashion.
- Work in a team and yet be independently motivated.
- Research industry trends and competitive information to stay best-in-class in the industry and offerings.
- Promote and maintain a positive company image and brand.

Qualifications:

- Bachelor's degree required.
- 5+ years of financial services industry preferred, ideally in a client service capacity.
- Securities related licensing (i.e. Series 6, 63, 65,66 or 7) strongly preferred.
- CDFA certification a plus.
- Strong investment background and knowledge.
- Ability to communicate complex issues clearly.
- Experience working with a customer relationship platform.
- Excellent communication skills, both oral and written.
- Must be self-motivated, flexible and able to manage several responsibilities concurrently.
- Strong client retention skills.

Benefits Offered:

- Paid time off
- Health Insurance
- 401(k) & Profit Sharing
- Disability Insurance

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