**Position Title:** Wealth Management Advisor
**Job Type:** Exempt
**Reports to:** Managing Partner
**Salary Range**: $90,000 to $285,0000 ( based on scope and volume of clients under advisement), bonus eligible

**Position Summary**: The Wealth Management Advisor will support and elevate existing client relationships as well as foster new client relationships by vetting and resolving client-related matters. This individual will guide clients and navigate them through strategic decisions anchored by their financial plan. These matters often include but are not limited to, investment decision, tax strategies, family and charitable gifting, trust & estate plans, healthcare/Medicare/Medicaid, risk management and debt optimization to ensure desired financial outcomes.

**Essential Functions**:

- Develop and manage new and existing client relationships, including ongoing and regular outreach, meetings, and communications.
- Develop and maintain positive relationships with prospective clients and centers of influence to foster business growth.
- Provide clients with a positive and professional experience by offering high-quality counsel and world class service.
- Perform client service activities, regular periodic reviews, financial plan updates, portfolio benchmarking.
- Build and communicate the key areas of a comprehensive financial plan (cash flow, statement of financial. condition, debt optimization, employee benefits, equity awards, insurance coverage, retirement, and estate structure).
- Identify and communicate new opportunities and challenges to clients and prospective clients.
- Develop and provide specialized expertise to the team to elevate the firm deliverables.

**Other Duties**:

- Continuing education and professional development.
- Maintain compliance with Prentice Wealth Management standards of conduct.
- Perform all other duties and/or analysis as assigned.

**Education & Experience**:

- Bachelor's degree
- 3+ years of client service experience preferred.
- Series 65 or Series 66 required; other securities related licensing preferred, but not required.
- Insurance license preferred, but not required.
- CFP®, CIMA®, or CPA designation preferred, but not required.
- Proficiency with Microsoft Office (Teams, Word, Outlook & Excel), SharePoint, Zoom, Adobe Acrobat, Right Capital, Kwanti, Charles Schwab, Pershing, LPL, Notion, RedTail, and Orion Advisor.

**Knowledge, Skills & Abilities**:

- Passionate about his/her clientele (the firm's clients) and their well-being.
- Ability to be flexible in a fast-paced environment.
- Strong ethical background and high standard of values.
- Proven track record of being a self-starter.
- Team player dedicated to achieving both personal and corporate goals.
- Ability to navigate emotionally charged conversations and complex family dynamics.
- Excellent presentation, time management and organization skills.
- Ability to communicate complex issues clearly.
- Understanding of financial planning, financial markets, and investment products.
- Excellent interpersonal and relationship building skills.

**Physical Demands & Work Environment:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Ability to lift and/or move up to 35 pounds.
- Frequently required to sit, reach with hands and arms. Occasionally required to stand, walk, climb stairs, balance, stoop, kneel, crouch.
- Noise level in the work environment is low to moderate.
- Occasional travel is to be expected for client meetings.