Rinehart Wealth Management
Greater Trust

Senior Financial Advisor

Description:

Rinehart Wealth Management is seeking an experienced and seasoned Senior Financial Advisor to join our wealth management team. The Senior Financial Advisor's primary responsibilities will include meeting with clients on a quarterly to annual basis to review the client's financial situation and coordinate with the Portfolio Manager regarding investment holdings and the performance of the portfolio. The Advisor will be responsible for developing detailed financial plans in a timely and effective manner using our firm's proprietary LIFETIME Portfolio Builder. A Senior Financial Advisor must deliver thoughtful, customized financial planning advice to clients and enjoy getting to know the clients, their families and their unique goals, in order to provide the very best advisory services. This individual will coordinate a team to service the clients that will process and manage all operational and administrative aspects of each client's accounts. A portion of the job will include meeting with and successfully recruiting prospective and new clients, as well as developing relationships with professionals that will result in new client referrals to grow the business. The most important aspect of the job however is meeting with existing clients on a regular basis to make in person presentations and deliver trusted financial advice while understanding each client's goals.

Our firm:

Rinehart Wealth Management is an experienced boutique firm providing expert wealth management solutions that are as unique and individual as our clients. We service clients with assets between $1-10 million and are a Fee-Only independent RIA firm. We have a team of financial advisors and investment managers, as well as a client service and operations team. Each client has a financial advisor and investment manager who work very closely together on producing comprehensive wealth management solutions through the integration of financial planning and investment management. The firm was started by Mary Rinehart in 1985 and throughout its 28 year history has had a singular focus on delivering trusted financial advice that is always in the best interest of the client. As a boutique firm, it is important that each associate be willing to work as a team with the entire firm.

Qualifications:

- 5+ years of experience in financial advisory and financial planning work
- Must be a designated CFP ® or willing to get the CFP ®
- Series 65 preferred but not required
- Ability and willingness to network and develop new client relationships
- Working knowledge of investment management
- Detail-oriented with good multi-tasking skills
- Excellent oral and written communication capabilities
- Community involvement

- Positive attitude with an open mind
- Knowledge of using CRM database (i.e. Junxure, Salesforce) and performance reporting software (i.e. Portfolio Center) preferred but not required

To apply:

Please send your CV in a pdf format as an attachment to rinehart@rinehartwealthmanagement.com with the Subject line being "Senior Financial Advisor Position." Include the best method of communication for us to contact you and set up an initial interview. Processing an applicant will include several rounds of interviews.

If you have any questions please call 704.374.0646 and ask to speak with Daniele Donahoe.

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