We are hiring!
Wealth Advisor
Arlington Heights, IL

VANTAGE FINANCIAL

OPPORTUNITY SNAPSHOT

Chance for an analyst to step up, or for a solo Wealth Advisor to take advantage of established infrastructure. If you have mastered the five key elements of the CFP (net worth, cash flow, insurance tax, and estate planning) and you have strong client-facing skills, this position offers you some great opportunities. You will:

- Enjoy **strong support** from seasoned professionals (including our President) who will wholeheartedly help you build a robust client base.
- **Expand your skills** in both planning and analysis, gaining the experience you need to obtain your CFP, if you don't already have it.
- Enjoy a **degree of autonomy** in managing your clients in a collaborative culture driven by strong values.
- Earn a c**ompetitive salary and great benefits,** including support for continuing education and certification.

REQUIREMENTS

To be a good fit for the Wealth Advisor opportunity you will have:

- A minimum of 3 to 5 years of experience in the financial planning industry. A CFP certification is preferred.
- A solid understanding of net worth, cash flow, insurance, tax and estate planning.
- Comprehensive understanding of the markets, economy and investments.
- Proven strong relationship-building skills.
- A general understanding of trading and strategic plan design.
- Leadership skills and the ability to coordinate internal resources.
- Analytical skills.
- Technical acumen and computer proficiency.
- Discernment and tenacity.
- The ability to create mature and focused written communications as well as strong, clear, warm and concise verbal engagement.
- A heart to serve,

THE ROLE

As a Wealth Advisor, the key responsibility of the role is leading the relationship with each of your clients.

- You will act as an advocate for your clients, understanding their needs, earning their respect and confidence, and growing the relationship to be all that it can be.
- Internally you will act as the "quarterback" of the Vantage team, coordinating among various resource to ensure the client experience leaving nothing wanting

WHY JOIN US

Setting you up for success

- Whether you are an Analyst ready to move up or a Wealth Advisor looking for a career home, we are committed to helping you thrive. You'll have mentoring and support from strong, experienced professionals, and we'll "seed" you with clients.

A heart to serve

- Our mission at Vantage is to help individuals feel a greater sense of control over their financial future, You'll play and important role in achieving the mission and, in the process, make a difference in people's lives.

Great environment

- You will gain experience in a collaborative, engaging, friendly environment surrounded by peers who enjoy pooling their knowledge and experience to yield out clients unmatched excellence.

Excellent Compensation

- We offer a competitive salary along with benefits that include a choice of health, dental and vision plans.
- 401(k) plan with company match.
- Paid time off and paid holidays.
- Reimbursement for continuing education and certification. We also will consider supporting educational opportunities in some circumstances.

ROAD TO SUCCESS

To excel in this role you will have the right balance of wealth advisor expertise, interpersonal and leadership skills. You'll need to create strong trust-based relationships with clients, to the extent that you can "read" the client and understand what they are *not* saying. Your ability to influence and motivate them will be essential. You'll use those same skills internally as you rally the team to deliver.

We've mentioned "a heart to serve" a couple of times because it is important in our model. We're looking for a professional who will be flexible, generous and considerate of the clients' needs, willing to go the extra mile to serve them. In your interactions you should engage in a warm and authentic way, demonstrating a genuine interest in their success.

CONTACT US

If you are interested in the Wealth Advisor role please email your Cover Letter and Resume to Kim Taylor (ktaylor@vantagefinancial.com) or James Lawson (jlawson@vantagefinancial.com) for consideration.