POSITION FOR HIRE

# ASSOCIATE ADVISER

**Job Summary**

The Associate Adviser (AA) will join the advisory team within Verum's ensemble, "Diamond Teams" structure to provide service and support to a variety of client relationships. Under the mentorship of other advisors, the primary focus of this role is an advisory apprenticeship where the team member will develop and fine-tune skills across financial planning and investment disciplines with the ultimate goal of growing into a Lead Adviser.

## Who Would Be a Good Fit?

- Strongly represents Verum's five values:
  *__Reliability, Effective Communication, Awareness, Continuous Improvement, Thoughtfulness__*
- Desire for a career path and mentorship under other experienced advisers
- Interest in growing financial planning, tax planning, and investment management knowledge to become a well-rounded financial adviser and practitioner to sophisticated clientele
- Positive attitude, self-starter, and able to manage multiple projects at once
- Energy and excitement around joining a fast-growing, fee-only wealth management practice and being a part of a high-functioning team

## Duties and Responsibilities

- Become proficient in Verum's technology stack and processes as it relates to client service, financial planning, and investment deliverables
- Support Senior and Lead Advisers to serve as a day-to-day point of contact for clients on assigned Diamond Team
- Attend and follow up on client meetings in concert with the Senior/Lead Advisers and centralized client service teams
- Work with other Associate Advisers and Lead Advisers to ensure consistency of service and advice across Diamond Teams
- Coordinate with client's professional advisers to ensure all parties are aligned
- Maintain and update client records in the CRM and file-sharing system
- Attend Financial Planning Committee meetings, conducting research and executing on projects, as needed; Investment Committee meeting attendance optional

## Experience and Expectations

- 3+ years of experience in wealth management, financial planning, tax advisory, or related field
- Experience working on a team and providing support to high net worth clients
- Specific experience or interest in tax planning is a plus
- Desire to learn under the mentorship of experienced advisers and grow into a Lead Adviser
- CFP® professional, or candidate for certification; CPA a plus

## Compensation and Benefits

- Competitive base salary + bonus potential
- Safe Harbor 401(k) plan, health/dental/vision insurance, life and disability insurance, DC FSA
- Unlimited vacation and sick leave (15 days minimum), and paid parental leave
- Verum Community Partnership Program with annual gift matching
- Employee Advisory Program
- Company-paid continuing education, additional designations, and conference attendance
- Hybrid or "flex" work environment

*Please email your resume and cover letter to **vmain@verumpartnership.com** to apply.*