VERUM PARTNERS

POSITION FOR HIRE

CLIENT PARTNER

ABOUT VERUM

Verum Partners is a fee-only independent advisory firm located in Charlotte, NC. Our collaborative, team-based model provides a sophisticated and approachable wealth management experience. At Verum, our mission is to improve lives – we know this starts with our people. We are intentional about creating opportunities to lead, to collaborate, to learn, to grow, and to find purpose in our work together.

DUTIES & RESPONSIBILITIES

At Verum, we operate in an ensemble structure with a centralized client service model. As a Client Partner, you will be apart of the centralized client service team, providing support across all advisory teams and clients of the firm. You will gain valuable exposure to the operations of the firm and build a great foundation for a career in the wealth management industry. The following responsibilities are expected of a client partner.

- Act as an operational expert and onboarding coordinator for new and existing client relationships
- Prepare account paperwork and complete money movements (wires, journals, checks, and EFT)
- Maintain CRM database, client files, and compliance reports
- Complete subscription documents and meet capital calls for alternative assets
- Act as a liaison between CPAs, attorneys, and other members of a client's professional team as needed
- Improve systems, provide suggestions, and help the team achieve greater efficiencies for the firm
- Serve as contact point between Verum and the firm's custodians (Fidelity and Charles Schwab)

For additional information on Verum's team structure, visit *https://verumpartnership.com/careers/*

WHO WOULD BE A GOOD FIT?

- Strongly represents Verum's five values:
  Reliability, Effective Communication, Awareness, Continuous Improvement, Thoughtfulness
- Positive attitude, strong communication skills, and desire to work with clients
- Detail-oriented, self-starter, and able to manage multiple projects at once
- Organized and maintains sense of urgency around completion of client requests
- Energy and excitement around joining a fast-growing, fee-only wealth management practice and being a part of a high-functioning team

EXPERIENCE AND EXPECTATIONS

- Bachelors degree with emphasis on industry-related coursework
- Professional experience in financial services industry is preferred
- Experience working in a client service based role
- Thrives in team-based, collaborative environment
- Exposure to balancing multiple tasks and projects at once and effectively managing workload
- Series 65 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 16-week paid parental leave
- Verum Community Partnership Program with annual gift matching
- Access to Employee Advisory Program
- Company-paid continuing education, additional designations, and conference attendance
- Hybrid or "flex" work environment

Please email your resume and brief letter of interest to recruiting@verumpartnership.com to apply.