VERUM PARTNERS

POSITION FOR HIRE

LEAD ADVISER

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.

WHO WOULD BE A GOOD FIT?

- Strongly represents Verum's five values:
  Reliability, Effective Communication, Awareness, Continuous Improvement, Thoughtfulness*
- Positive attitude and strong communication skills
- Detail-oriented, 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 & RESPONSIBILITIES

At Verum, we operate in an ensemble structure. Our advisory teams are organized into Diamond Teams, which include a senior adviser, two lead advisers, and an associate adviser. Operations, financial planning and investments make up our centralized client service team, who together support clients across all Diamonds. Your role as a lead adviser will include the following:

- Serve as lead adviser and main contact for 25-50 clients, managing $500K-$1M in revenue
- Responsible for the management and retention of your designated clients
- Ability to focus 10-20% of time on business development, generating 2-4 new clients each year
- Assist Senior Advisers as the co-adviser on larger, more complex client relationships
- Serve as a member on Financial Planning Committee or Investment Committee, and generate 2-4 pieces of content per year in area of expertise
- Desire to participate in community events and represent Verum at sponsored professional events
- Become proficient in Verum's technology stack and processes as it relates to client service, financial planning, and investment deliverables

EXPERIENCE & EXPECTATIONS

- 5+ years of experience in an advisory role, 2+ years leading client relationships
- Experience working on a team and providing support to high net worth clients
- Holds one of the following designations: CFP®, CPA, CFA®, or Pertinent Masters Degree
- Ability to prep for and lead multiple client meetings a week
- Desire for continuing education in support of designation and mentoring associate advisers

COMPENSATION & BENEFITS

- Base salary of $120-$165k, based on experience. Annual variable bonus based on performance, client retention, and practice growth. Eligible for New Business Bonus Program
- Safe Harbor 401(k) plan, health/dental/vision insurance, life and disability insurance, DC FSA
- Unlimited vacation and sick leave, and paid parental leave
- Verum Community Partnership Program with annual gift matching
- Employee Advisory Program
- Company support for continuing education, additional designations, and conference attendance
- Hybrid or "flex" work environment