Title Options: Wealth Manager/Financial Planner

About Us

Mosaic Retirement Planning, LLC is a comprehensive financial planning and investment advisory firm. MRP offers financial planning, annuities, insurance and investments to the public. It's founder has been providing solutions to retirees and pre-retirees since 2007 based on the belief that it's always right to put the client's interests first, resulting in a happy & loyal client base. MRP has adopted a financial planning process that is recommended by the CFP Board, which is widely regarded the gold standard for financial planning. MRP is an independent firm, and therefore does not promote any products, MRP provides custom planning to every client and uses a diverse array of products to implement the client's financial plan. MRP is committed to be the best in the region at personal retirement planning, for a reasonable cost. MRP's mission is to have a positive impact in the lives of the community, one family at a time. Visit www.mosaicretirementplanning.com for more information.

Faith * Respect * Truth * Family are our Core Values. We work toward being good stewards and want others on our team to have the same passion.

Position Summary

The Wealth Manager/Financial Planner seeks to attain their CERTIFIED FINANCIAL PLANNER™ accreditation. They have access to warm leads created by the collective marketing efforts of the firm. The WM/FP will have access to proprietary and proven methods of marketing and client acquisition. They will have shared access to a vast array of industry leading technology to handle a wide variety of client needs. They will be provided administrative support. The WM/FP is expected to share in and utilize these sources to acquire and meet the needs of new clients and maintain high quality services levels of existing clients. This person is expected to provide detailed and comprehensive guidance to clients around their personal and business financial affairs including, but not limited to their estate planning, charitable planning, tax planning/minimization, asset protection strategies, income protection strategies, investments, life insurance, retirement plans and real property. It is the WM/FP's responsibility to manage 5 key areas of their practice:

- Business Development
- Client Relationships
- Investment Advisory
- Financial Planning
- Operations

Duties and Responsibilities include, but not limited to:

Business Development, Marketing and Client Relations

- Attend various evening company events and assist in promoting the services of the firm and yourself.
- Conduct outbound calls to prospects & leads.
- Implement marketing campaigns, perform general operational duties, and other assignments as needed.
- Brainstorm new business generating activities and events and operationalize from idea to full implementation.
- Schedule & confirm appointments with clients, prospects or strategic business relationships.
- Show an ability to effectively present to and compel prospective clients to hire you.

Client Onboarding, Financial Planning & Investment Advisory

- Implement the CFP Boards EGADIM financial planning process.
- Refine presentation tools using various financial planning & investment advisory software.
- Effectively communicate investment & financial planning capabilities to prospective clients, and then effectively communicate plan suggestions upon engagement with the client.
- Learn to scale the above duties and services without negatively impacting service.

Critical Skills Sought

- Entrepreneurial spirit – You are expected to be your own boss, motivator, & problem solver.
- Sales skills – you must be able to compel prospects to meet with and hire you.
- Confidentiality: maintain all proprietary information, and information related to customer accounts in strictest confidence.
- Faith & Family values
- Strong sense of professionalism & integrity.
- Strong financial and analytical skills
- Strong ability to handle and overcome objections & rejections
- Outgoing personality with the ability to create new relationships and foster existing ones
- Good oral/written communication, organizational and problem solving ability.
- Adherence to 7 Core Company Values: Trust, Responsibility, Advocacy, Integrity, Teamwork, Dedication & Communication

Qualifications

- College degree or equivalent required.
- 5 years of Sales experience required.
- 5 years of financial services experience required; investment, annuity and life products strongly preferred.
- Must have series 6, 7, or 65/66. Life/Health insurance licenses preferred. CFP® designation a plus.
- Must be proficient in word processing, spreadsheet and presentation software and generally very adept at technology applications and software.
- Must be able to pass an initial & ongoing drug screens.

Why Work at MRP

If you have an existing client base but are looking for a better fit, at MRP you have the opportunity to enjoy industry leading software, a high integrity culture, autonomy and independence, rewards commensurate with your efforts, a vast array of products and solutions for your clients, uncapped earnings potential, work within a cohesive small team, have a substantial influence on the direction of the firm, a small supportive/cooperative compliance department, and be routinely given warm leads and shown how to meet with 10 warm leads a month. We are an ideal fit for an established financial advisor that a) wants warm leads b) wants to turn their transactional business into more fee based AUM & planning, or c) feels confined and limited by their compliance department. At MRP, you will enjoy the following benefits:

- Autonomy and ability to influence the direction of the firm, leading to a potential partnership.
- Warm leads & learn proven lead generation techniques
- Vast and premium planning & presentation software
- Cohesive small team.
- Competitive comp structure
- Great place to make a big impact on many lives.
- Choose a salary or uncapped compensation structure
- Access to strategic expert partners to elevate your level of service & referral business

How to Apply

Send resume and cover letter to info@mosaicretirement.com. Cover letter should include the following:

- Please tell us why you are interested in this position.
- Please tell us about your current practice.

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This description covers the major purpose and major functions of the job. It is not intended to give all details or a step by step account of the way each task is to be performed. Employees may receive other job related instructions and be required to perform other job related duties requested.
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