



**Title Options:** Strategic Expert Partner: CPA, Accountant, Tax Preparer, or Estate Planning Attorney

YOU DO BUSINESS UNDER YOUR OWN LLC, NOT UNDER MOSAIC RETIREMENT PLANNING, LLC.

**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. MRP is committed to be the best in the region at personal retirement planning, for a reasonable cost. MRP believes this is not possible by attempting to be all things to all people, rather, MRP believes in building relationships & leveraging experts in complementary professions such as CPA’s, realtors, bankers, estate planning attorneys, home and auto brokers, health insurance experts, and Medicare/Medicaid experts, to name a few. *MRP does not expect anything in return* from its partners except an equally honest effort to provide their clients the best service possible. Visit [www.mosaicretirementplanning.com](http://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 Strategic Expert Partner aspires for referral business from MRP by providing impromptu reviews and consultations with CFP® and/or his clientele, and aspires to elevate their level of service to appeal to more HNW clientele. The Strategic Partner will act in good faith and will not be compensated directly by MRP, unless agreed upon on a case by case basis.

**Duties and Responsibilities include, but not limited to:**

- Strategic Expert Partner must at least conduct their secondary place of business out of the offices of Mosaic Retirement Planning, LLC and will pay rent for such space. Access to an assistant is negotiable.
- Strategic Expert Partner will not be employed by MRP, but will maintain their own DBA/entity and therefore are responsible for 100% of your company operations.
- Strategic Expert Partner may receive their own signage adjacent to MRP signage.
- Infrequently review client documents gathered by CFP® and provide oral and/or written feedback that will assist CFP’s recommendation whether or not the client should hire the strategic expert.
- Promptly respond to questions relative to your expertise from CFP® on an ad hoc basis in good faith.
- Encouraged to attend various company events for the mutually beneficial opportunity to promote the services of the firm and yourself.
- You will have the opportunity to leverage your expertise, that you have access to a team of experts.

**Why Partner with MRP**

By aligning your firm with a complementary firm, you can differentiate your practice from your competitors. Although you may gain referrals organically, but not in exchange for clients, services or compensation, the primary value proposition is the alignment of resources and complementary expertise, creating a 1+1 = 3 type of synergy. In this rare opportunity, you will be able to better position yourself for HNW clientele and potentially reduce your overhead. By partnering with MRP, you will enjoy the following benefits:

- Office space with a CFP® - potentially a satellite location for your practice
- Cohesive small team
- Leverage expertise of complementary professionals
- Improved client acquisition
- Access to HNW prospects
- Access to business development opportunities, marketing resources and training
- Potentially align your faith based principles with another’s

**How to Apply**

Contact the Owner directly by sending an email to [bhablutzel@mosaicretirement.com](mailto:bhablutzel@mosaicretirement.com).

\*\*\*\*\*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.\*\*\*\*\*