

At White Ember clients don't just get one Financial Advisor... they get a whole Team of professionals with varying specialties.

Overview

If you have a passion for investing and people and want to work in a client-facing role, our new Relationship Manager position may be just for you.

The successful candidate will be responsible for meeting with a select group of clients, monitoring their investments, goals and objectives, educating them about our services, and guiding them to make the best financial decisions. The responsibilities include assisting in market research, and business growth and plays a key part in generating new business by identifying opportunities.

Job Description

The Relationship Manager position will assist in building trusting relationships with new and existing clients. The successful candidate will work closely with the White Ember team to educate and guide clients to make the best decisions for their financial future. To succeed in this role, one should be outgoing, customer service-oriented, and have excellent communication skills. Applicants should be a strategic thinker with an analytical mind and strong problem-solving skills.

Responsibilities

- Provide positive and professional service to the client base assigned
- Handle all communication with the client base including phone calls, emails, and meetings
- Follows up on firm-generated leads
- Attend all client meetings and be responsible for all follow-up activities
- Build and maintain a relationship with the client base with the main focus on service and operations
- Assist in developing client review materials
- Assist the Senior Financial Advisor as requested
- Interact with the firm's operations team on all planning and follow up
- Develop and maintain written systems of all activities
- Attend training and information-sharing meetings scheduled for the operations team
- Maintain all continuing education requirements

Desired Skills and Experience

- Excellent interpersonal skills
- Excellent communication skills
- Excellent attitude and an extraordinary client service orientation
- A genuine interest in serving and caring for other people
- Excellent organizational and time management skills
- Community involvement
- Ambition for personal and business growth
- Ability to handle multiple tasks and handle stress

Qualifications

Required

- FINRA Series 7 & 66, Missouri Life Accident & Health Insurance Licenses (to be completed within one year)
- Clean U-4 history (If currently Securities Licensed)
- Bachelor's degree
- Proficient in Microsoft Office

Helpful

- Previous client relationship management experience is preferred
- Financial Professional Designations (CFP®, CFA®, CRPC®, AWMA®, etc.)
- 3 or more years of investment industry experience

Salary and Benefits

- Competitive Salary based on experience and credentials, 401k, paid holidays and bonus opportunities.

Please apply if...

- You are a creative, driven, friendly, easy-going professional
- You are a self-starter
- You are passionate about client service
- You are looking to contribute to a culture, firm and Team like White Ember

Please don't not apply if...

- You don't have a genuine love for people
- You can't handle stress or adapt to change
- You don't like learning and being challenged
- You are just looking for a paycheck, not a career

This is a place to take what you do very seriously but not one where you take yourself too seriously! Bottom line, we will spend a lot of time together and we want to all enjoy coming to work everyday. If you read this job description and found humor in it and maybe even laughed a little we want to hear from you!

How to Apply

Please send your resume and letter of interest to info@whiteember.com. Please spend time researching our firm by visiting our website, watching our videos and reading our blog. If White Ember and this position sound interesting to you, please include in your letter:

- Why you are a good fit for our brand, culture, Team and position
- How you can contribute to the above
- Examples of anything that highlights you or your work – any and all mediums are acceptable

We will review your credentials and will respond with more detail about this opportunity. You should anticipate multiple rounds of interviewing with members of the Team. We are concerned about getting the right people on our team so our hiring process has several steps.

Here's What You Need to Know About White Ember Financial Planning

White Ember Financial Planning is advisory firm based in Nevada, Missouri, founded over 30 years ago. Dedicated to serving families, business owners, executives and institutions the firm provides the highest level of service for our local and national clients in financial planning and investment management. For more information about our company, please visit our website www.whiteember.com