CLIENT WEALTH STRATEGIST

As a firm, we have big goals to continue to grow and increase our impact for those clients we currently serve and the clients we want to serve in the future. We are looking for a very talented lead advisor who is wildly passionate about the journey we are on and will guide, inspire, and influence our clients, team, and outcomes.

It starts with values and culture for us! Our Client Wealth Strategist must be completely aligned with our purpose and values, *as outlined below*. We desire a leader who is both inspirational and sensible, a person who is willing to follow for a cause and be someone others are willing to follow.

This is a real influential position. The Client Wealth Strategist needs to be ready to…

◊ Lead the delivery to clients all that is promised as a firm.
◊ Form meaningful relationships with clients.
◊ Deliver specialized and valuable advice
◊ Build and refine our advice model to elevate client experience
◊ Nurture the growth of your team members
◊ Grow at a fast pace

Your leadership in creating meaningful client outcomes is important as we are positioned to achieve extraordinary things in the lives of our clients, team, and within the wealth management industry. Please email CEO, Jarrod.Musick@destinycapital.com, if you are ready to apart of our team.

PURPOSE

We exist to help entrepreneurs and their families live remarkable lives during their entrepreneurial journey and after it ends.

VALUES

Have Agency
Initiate, execute, improve, repeat. This cycle of movement is a practice that we rely on to succeed. We are each responsible for ourselves and how we spend our time to ensure that we reach our goals in harmony with our values and priorities.

Work With Integrity
Our values are deep-rooted into the decisions we make. We pride ourselves on doing what we say we will do and delivering at the best of our abilities. We know that our teammates will always do the same.

Collaborate As a Team
We share a common goal, the success of our firm and each other. Because of this, we understand the importance of sharing successes, welcoming feedback, and encouraging innovative ideas across the boundaries of our departments.

Be Adaptive
We embrace flexibility, willingness, and resourcefulness to nimbly move through our ever-changing industry to support our clients and our teammates. For us, it is better to have a mindset of abundance than scarcity.

Self-Inspire Our teammates go above and beyond the daily workflows. We innovate and problem solve in bold ways to make our client's world and our firm a better place to exist. Professional and personal growth is strongly practiced and admired.

Remain Empathetic
Empathy has always been the heart of our firm. We all share similar experiences and emotions which is why we give others the space to work through their own challenges and act as a support system free of judgement. In an increasingly analytical world, we take the time to "feel" first then act.

Show Respect
Responding versus reacting is a vital tool our team believes in. Offering kindness and assuming good intent from one another allows us to behave from a place of curiosity and be open-minded in the sharing of each other's ideas.

RESPONSIBILITIES

- Ultimate responsibility for client satisfaction and retention
- Is responsible for development of the "big picture" client strategy and develops client service roadmap to direct their team on execution.
- Leads overall client experience and execution of all areas.
- You are a brand ambassador.
  - Responsible for COI cultivation and activation.
  - Responsible for client referral cultivation.
- New client onboarding and building meaningful relationship.
- Leads all client meetings and client advice related inquiries.
- Is responsible for final review of client deliverables ahead of advising on them.
- Will empower the Coordinator to execute all elements of client data gathering, financial plan creation, and client service.
- Will provide ongoing feedback, mentorship, and career development to the Coordinator on your team.
- Will collaborate closely with planning, investment, account services, and marketing.
- Contributes to firm growth by identifying opportunities to do more client work for existing client and/or gather new assets from existing clients.
- Proficient in CRM, eMoney, Holistiplan, Riskalyze, Wealthscape, Orion, Microsoft, etc…
- Learn role functions of CWC and Planner as apart of continuity so we can all support one another to live Remarkable Lives.

Qualifications

- A confident leader who loves people, is passionate about the art of advice and client service.
- Has CFP designation with strong financial planning acumen
- Several years of proven experience in similar business area
- Proficient in understanding the needs of a client and then be capable of strategizing tailored goal and financial solutions.
- Proven relationship building skills.
- Strong time and priority management skills
- Problem-solving skills & a solution seeking mindset
- Ability to create consistency in high level output and respond client inquiries independently.
- Ability to thrive in a cross-functional environment.
- Top notch communication and interpersonal skills
- Committed to quality of life for self and for team
- Understands that successful business is a marathon, not a sprint, and believes in balance
- Driven and self-motivated for success