Position Overview: Senior Wealth Advisor

Are you ready to be a team member of Piton Wealth?

> *As a team, we foster relationships and develop financial plans with the highest level of professional competence and personal integrity. Through our diligent actions toward excellent results, our passion to inspire success as steward of financial wealth is manifest. Ultimately, when the gift of trust is earned, holistically and with time, clients become family.*

Piton Wealth is seeking a highly motivated and detail-oriented **Senior Wealth Advisor** to join our team. Piton Wealth is wholly dedicated to supporting clients' goals, with a broad-based approach to help our clients analyze their current situation, develop in-depth financial plans, and help them implement an integrated financial strategy using our trademark® process. Piton Wealth is committed to a team approach that embraces learning, change, processes, and technology. This position has direct contact with our clients, colleagues, and external partners. The Senior Wealth Advisor manages existing client relationships and independently generates new business. The advisor must be professional, knowledgeable, accurate, and organized with a heart for service and a strong work ethic. Attention to detail and analytical skills are critical. The qualified candidate will understand the complexities of confidentiality when entrusted with client's personal financial information and the requirements of working with regulatory compliance. The candidate will have two or more advanced designations, including the CFP®, and a minimum of 10 years of experience in financial planning, estate planning, and income tax planning.

What makes this a unique opportunity for the right advisor? Piton Wealth has a specialized operations staff, with paraplanners, to support the Senior Wealth Advisor. Piton also has investment analysts that spearhead the market research for the portfolio platform and trading specialists for the execution of trades. The team manages corporate compliance for regulation, four experienced advisors to support and meet with clients during planned and unplanned absences. Collaboration with a respected and award-winning advisor will be an ongoing and enriching component of the work. In the future, expect planned and executable steps to transition to part-time during pre-retirement years while your clients continue to be served, culminating in continuation of your legacy of care for your clients after retirement.

Piton Wealth is committed to providing equal opportunity (EEO) to all qualified candidates.

As part of the Piton Wealth recruiting/hiring process, a verification of the candidate's background will be made to complete the hiring/contracting process.

Job Details:

- Full time, in office, Monday through Friday 8:30 – 5:30
- Independently researches, analyzes and recommends planning and investment strategies for clients
- Identifies and brings new clients into the practice
- Networks with target clients and natural market referral sources to target net new money goals
- Maintains an active role in identifying opportunities for the clients
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- Provides back-up support in the absence of the CEO/Senior Wealth Advisor
- Service existing clients through practice guidelines, cost awareness, and fee schedule
- Meets KPIs and vital statistics consistently
- Represents Piton Wealth at special events within and outside the organization
- Projects and maintains a leadership role within Piton Wealth
- Ensures license, certification, compliance, and continuing education is current

Education and Experience:

- Bachelor's degree in business, finance, or accounting
- CFP® designation and one or more additional designations
- 10 or more years' experience in financial planning, estate planning, and income tax planning
- Clean U-4 and U-5 history as applicable

Supplemental Pay:
Bonus based on revenue growth, performance, and profit

Benefits:

- Group medical and dental insurance with supplemented premiums and HSA option
- 3% dollar for dollar matching retirement plan
- $50,000 group life and 60% salary replacement disability insurance
- Sick days accrued at 1 hour for every 40 hours worked up to 40 hours per year
- Ten paid holidays
- Compensation of reasonable expenses towards additional business-related designations

Work Location:
Kennewick, WA (11257 W. Clearwater Ave., Suite 110, 509-582-0570)
or Kalispell, MT (18 Village Loop Rd, 406-756-7797)
APPLY by sending a resume to team@pitonwealth.com.