Position Overview: Wealth Advisor

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

> *As a team, we foster relationship 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 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 Wealth Advisor independently generates new business and manages client relationships. 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. Preferred candidate has a CFP® designation or is working towards this designation, has a minimum of 3 years of experience in financial planning, estate planning, and income tax planning. This advisor should also have a demonstrated skill in attracting people to work together to accomplish impressive results---both by recruiting new clients and also in multiple facets of their lives.

Why is this such a unique opportunity for the right advisor? Piton Wealth is big enough to be reaching the peak of growth opportunities, but small enough to be intentionally seeking the next generation of practice ownership. We will be looking for this advisor to become a minority owner within the first 1-3 years of joining our team. Piton has a full operations staff, including HR functions, marketing, investment management and trading. The team manages corporate compliance for regulation, four experienced advisors to support and meet with clients during planned and unplanned absences. We have performance bonuses and a profit sharing plan in place. Collaboration with a highly-respected and award-winning advisor to increase knowledge, experience, and execution of complex plans will be an ongoing and enriching component of the job.

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 advisors within the office
- Service existing clients through practice guidelines, cost awareness, and fee schedule
- Meets KPIs and vital statistics consistently
- Presents at client and community events quarterly
- Represents Piton Wealth at special events within and outside the organization
- Ensures license, certification, compliance, and continuing education is current

Preferred Education and Experience:

- Bachelor's degree in business, finance or accounting or college coursework in finance/accounting
- Working towards or completion of CFP® in addition to current designation
- Understanding and basic execution of financial planning, estate planning and income tax planning
- Clean U-4 and U-5 history as applicable

Compensation:
Salary plus bonus based on individual and team performance, and profit sharing

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
- 2 weeks of accrued vacation
- Ten paid holidays
- Compensation of reasonable expenses towards additional job-related designations
- Upon demonstration of desire and ability to become a part of the future succession plan, buy/sell agreement will be considered with existing owners

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.