PERSPECTIVE
Wealth Partners

<u>About Perspective Wealth Partners</u>

Perspective Wealth Partners ***(PWP),*** founded in 2006, is a fee-only SEC-registered RIA, located in Boise, Idaho and serves about 250 households with approximately $700MM in assets.

We are seeking an experienced and proven professional who desires to be an integral part of a small team, while making a deep impact on clients. The firm currently has nine employees, six advisors and three members of our operations team.

PWP offers clients a wealth management experience that allows them to relax and have confidence pursuing their intentions. We are obsessive about optimizing after-tax return for our clients. With CPAs on staff, our clients rely on us for in-depth tax planning and analysis.

In tandem with providing a first–rate wealth management experience, we are also purposeful about helping our clients live meaningful lives, thereby being a trusted thought-partner in non-financial areas.

As a fiduciary to our clients, PWP is legally obligated to provide investment portfolio management and financial planning that is in a client's best interest without selling any products or receiving commissions.

We are deeply intentional about our internal culture and core values, which are comprised of: being service oriented, committed to excellence, heartfelt, relatable, and genuine.

PWP offers competitive compensation including salary and bonus, 401(k), health insurance, and paid time off *(PTO)*. For the successful candidate, we would offer a relocation allowance to offset moving expenses.

PWP is an Equal Opportunity Employer. We support diversity in the workplace and embrace diversity in the clients we serve.

<u>Role Summary</u>

PWP is seeking an Associate Financial Advisor.

This Associate Financial Advisor will have the primary role of providing deep client relationship management and technical support to seasoned members of the Advisory Team, as well as support the day-to-day relationships, along with participating in/or conducting client meetings.

While the addition of new clients and assets is encouraged and rewarded, the Associate Financial Advisor's focus will be providing deep, meaningful service to our current clientele.

If you aspire to be an owner, the position will be a good fit for you, as we offer a career path for our advisors to become partners in the firm. Conversely, if you do not desire to be a firm owner, we offer a sustainable path to Senior Advisor.

Core Responsibilities

- Address current client needs, proactively uncover ways to deliver greater value to clients and new ways to deliver a delightful experience.
- Collaborate with the firm's other Advisors to deliver all aspects of personal financial planning to our client base, including: retirement planning, tax-efficient distribution planning and investment strategies, social security claiming strategies, employer stock and option planning, deferred compensation planning, pension analysis, estate planning, insurance review and analysis, tax loss harvesting, etc.
- Work with other team members to evaluate/help drive new firm-wide strategic initiatives.
- Promote a culture of compliance within the advisory team by following and enforcing firm policies and procedures and all applicable compliance rules and regulations.
- Active community participation.

Interpersonal Qualifications

- Relationship driven and a passion for wealth management.
- Positive energy and professional, upbeat attitude.
- Strong alignment with PWP's firm's vision and values.
- Excellent communication, networking and influencing skills.
- Ability to communicate complex financial topics in a simple, and understandable manner.
- High level of organization, accuracy, and attention to detail.
- Embraces personal development and feedback, not just coachable but has a desire for coaching.
- Ability to work and multi-task in a fast-paced, evolving environment – can pivot quickly.
- Comfortable with a broad set of responsibilities.

Education/Experience/Technical Qualifications

- Bachelor's degree.
- CFP® designation preferred *(required for firm advancement).*
- Minimum of two years of financial planning or wealth management experience with direct client interaction.
    - If no direct experience, exceptional senior experience with direct client service responsibility.
- Series 65 license *(required for role: if not held, must be obtained within three months of hire*).
- Possesses strong ability to learn and apply new software systems quickly.
- Highly analytical and proficient in Microsoft Excel, Word, and PowerPoint.
- Strong attention to detail, poised, organized, and able to manage multiple tasks efficiently.
- Ability to make effective decisions using impeccable ethical judgment.
- Track record of establishing and maintaining successful interpersonal relationships.

Compensation

- We benchmark our compensation and strive to pay above market given our small firm size and broad responsibilities.
- PWP's total compensation for this position ranges from $75K to $100K, depending on experience and expertise.

Application Process

If interested, please email a resume and cover letter to position@perspectivewealth.com and use "Associate Financial Advisor" in the subject line.

In the cover letter please describe why this position is of interest to you and why you love wealth management as a vocation, or what interests you about it.

Given the critical nature of who we are in the lives of our clients and the intention we use in crafting the culture of our firm, our hiring process will be rigorous, involving multiple interviews and considerable written communication. If you're up for this rigor, we look forward to hearing from you.