PERSPECTIVE
Wealth Partners

About Perspective Wealth Partners

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

PWP offers clients a wealth management experience focused on achieving their financial goals and living meaningful lives.

In tandem with providing a first-rate wealth management experience, we are trusted thought-partners in non-financial areas to our clients.

As a fiduciary, PWP is legally obligated to provide investment portfolio management and financial planning that is in the client's best interest. We are obsessive about optimizing after-tax returns for our clients. With CPAs on staff, our clients rely on us for in-depth tax planning and analysis.

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 and benefits including salary and bonus, 401(k) matching, 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.

Role Summary

PWP is seeking a Senior (Lead) Financial Advisor.

As a Senior Financial Advisor, you will primarily manage and nurture deep relationships with our existing clients and cultivate new client relationships through referrals and networking.

Core Responsibilities

- You will be responsible for thoughtfully delivering on all aspects of personalized wealth management to our client base, including retirement planning, tax-efficient distribution planning, 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.
- Help proactively uncover ways to deliver significant value to clients and new ways to provide a delightful experience.
- Work with other team members to evaluate/help drive new firm-wide strategic initiatives.
- Provide guidance and mentorship to junior advisors and support staff.
- Promote a culture of compliance by following and enforcing firm policies and procedures and all applicable compliance rules and regulations.
- Actively participate in your community.

Interpersonal Qualifications

- Strong alignment with PWP's firm's vision and values.
- Positive energy and professional, upbeat attitude.
- Excellent communication, interpersonal, and relationship-building skills.
- High level of organization, accuracy, and attention to detail.
- Ability to work independently and manage multiple clients.
- Ability to communicate complex financial topics in a simple and understandable manner.
- Embraces personal development and feedback; not just coachable, but has a desire for coaching.

Experience/Technical Qualifications

- Bachelor's degree and a CFP® designation or willingness to obtain one.
- FINRA Series 65/66 (or equivalent) or willingness to obtain license in the first 90 days.
- Minimum of 5-7 years of professional experience in a related field, with a proven track record of success.
- Highly analytical and proficient in Microsoft Excel.

Compensation

- We benchmark our compensation to the industry and intentionally strive to pay above market given our small firm size and broad responsibilities.
- PWP's total cash compensation for this position ranges from $150K to $180K, depending on experience and expertise.

Application Process

- If interested, please email a resume and cover letter to position@perspectivewealth.com and use "Senior Financial Advisor" in the subject line.
- In the cover letter, please describe why this position is of interest to you and how you'd be a great fit to our team and culture.
- 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.