Wealth Manager

The Retirement Planning Group is a national registered investment advisory firm with offices in Leawood, KS, St. Louis, MO & Springfield, MO. With over over 1300 families and over $1.1 Billion in assets under management as of 04/05/2021, we are one of the fastest growing companies in the Kansas City area. We help clients and their families navigate every financial decision they face throughout their lives, providing comprehensive financial planning and tax services along with education and guidance on Medicare, Social Security, long-term care insurance, travel and more.

Overview:

TRPG is expanding our team and looking for a motivated individual to join us as a Wealth Manager. This position is a critical part of our team; it's important that the person we choose will be a "fit" with our philosophies and shared values.

We value relationships, integrity and sound advice. We believe that providing the best for clients requires us to support Wealth Managers with resources, training and an experienced team to collaborate with and assist you.

We take an uncommon approach to financial services, focusing on long-term results and leveraging technology, exceptional relationship management and customized strategies. We have developed proprietary lead generation sources and will provide the right candidate with prospective clients.

Responsibilities:

- Use our leads to teach and convert prospects into clients, follow up with prospective clients, maximize relationships, create referrals and referral partnerships
- Work with prospective client and current clients to understand their goals, concerns and current financial information. Analyze information to create a long-range financial plan
- Develop and maintain a base of clients who value your input and guidance
- Work with clients to keep their financial plans current and aligned with their goals

Requirements:

- Investment industry and financial planning experience is required
- Self-motivated individual with a dynamic, confident personality, a strong work ethic, high integrity and passion for succeeding
- Desire to help others achieve financial success through planning and protection
- An interest in cultivating long term relationships
- Excellent client service skills
- A four-year college degree

Benefits:

- Health/Life/disability insurance
- 401k match
- Complimentary tax preparation

To Apply:
Email resume to: Michelle Burchard – michelle@planningretirements.com
OR copy and paste link to your browser:
https://apply.workable.com/the-retirement-planning-group-1/j/F0D1FCF741/apply/