Req 22008264 Wealth Planner

Link to apply: [Leawood/Wealth-Planner_22008264]

Business Overview
Merrill Lynch Wealth Management is a leading provider of comprehensive wealth management and investment products and services for individuals, companies, and institutions. Merrill Lynch Wealth Management is one of the largest businesses of its kind in the world specializing in goals-based wealth management, including planning for retirement, education, legacy, and other life goals through investment advice and guidance.

The Wealth Planner works closely with Financial Advisor(s) and/or Advisor Team(s) to provide comprehensive financial planning through strategic planning advice. He/she is focused on understanding clients' needs and goals proactively identifying strategic planning and investment opportunities to better meet client's financial objectives. Drives the planning process through execution of extensive data gathering, analyzing, and data input with the end goal of creating a robust financial plan for Financial Advisor(s) and Advisor Team(s) to share with clients. Fosters relationships with internal specialists to ensure alignment of client goals to plan and explore opportunities to further enhance client relationships. The successful candidate will have knowledge of estate and gift taxes, philanthropy, trust structures, insurance, income tax planning, and investment Management. Requires a comprehensive understanding of the suite of solutions, platforms, and initiatives across the enterprise.

Role Responsibilities
•Gather extensive financial information to drive plan creation
•Enter client information into planning tool
•Schedule and prepare materials for client meetings
•Attend client meetings to review plan, capture changes and agree on next steps
•Leverage financial data to identify possible solutions to meet client needs and goals
•Engage specialists and partners to address client needs and deliver solutions
•Monitor and update client information and plan changes on a consistent basis

Qualifications
•Series 7, 63/65 or 66 or equivalent; must obtain all state registrations in support of Financial Advisor(s) and Advisor Team(s) If Series 7, 63/65 or 66 or equivalent are not currently held, must be obtained within a specified timeframe to be eligible for Specialist position.
•SAFE ACT Registration; ADV-2B Required
•CFP® or CPWA® designation preferred or obtain and/or maintain at least one firm approved designation
•Understanding of how to deliver a strong overall client experience
•Thorough knowledge and understanding of the suite of Wealth Management products and services
•Possess and demonstrate strong communication skills
•Superior relationship management skills to partner effectively with specialists and across lines of business to meet the needs of clients
•Strong analytical skills with the ability to identify trends, root cause and effects and develop strategies to increase growth and mitigate risk
•Ability to make sound decisions by having a deep understanding of financial planning best practices and policies/procedures
•Ability to identify client needs and concerns, and articulate appropriate approach to align solutions to goals in a suitable and controlled way

Please be advised that under current company policy, Merrill Lynch does not sponsor a visa petition or other work authorization, nor will the company provide relocation assistance, for this position.