# OneDigital Wealth Management Advisor

The Wealth Advisor drives business results by developing and maintaining client relationships, understanding client needs and delivering an exceptional client experience. The Wealth Advisor will serve as a resource for clients with wealth management needs and financial planning solutions, as well as, exhibiting technical knowledge and competency in financial management, retirement and conducting retirement plan participant education meetings.

**Essential Duties and Responsibilities (include but are not limited to):**

- Develop leads through working with existing plan clients, educational efforts, networking and client referrals. Convert leads to wealth management clients. Meet annual sales goals by advancing prospects through the opportunity pipeline to close business.
- Explain the value proposition of wealth management services to retirement plan participants. Qualify potential business leads. Close qualified business.
- Exhibit technical knowledge and competency in financial management, retirement, and conduct retirement plan participant education meetings; meet with individual participants; build relationships with participants and key employees.
- Drive business results by developing, managing and expanding client relationships through referrals and new business development activities
- Earn clients' trust by thoroughly understanding client needs, providing targeted advice, developing thoughtful solutions and delivering an exceptional client experience
- Advise clients on all aspects of wealth management including: asset allocation, financial management and wealth planning
- Work closely with the Portfolio Management Team to understand the financial philosophy and ensure that clients are provided with the best financial solutions.
- Meet with clients regularly to ensure financials align with their goals, risk tolerance and personal situation.
- Work in conjunction with the service team on day-to-day service including financial review meetings and financial planning.

**Qualifications, Skills and Requirements:**

- Strong analytical, communication and interpersonal skills
- Entrepreneurial spirit coupled with an ability to thrive in a team-based and collaborative environment
- Dynamic and credible professional who communicates with clarity and has exceptional presentation skills
- Self-motivated with a commitment to excellence and a high level of integrity
- CFP® or CFP® candidate required.
- Richmond, VA Office – Working remote flexibility.