About you

Ready to shape your career in wealth management and make a real difference in people's lives? Are you looking for a challenge with lots of autonomy? If you're a driven, independent professional seeking a dynamic environment where your contributions matter, and you believe in doing well by doing good, you've found your family!

About Opus Wealth Management

Opus Wealth Management is a Dallas-based holistic financial services firm specializing in helping people with complex financial lives. Belpointe and its Family Office's resources support our independent team, ensuring access to the most sophisticated strategies for the high-net-worth. Our planning-intensive approach is aimed at helping individuals and families build wealth and secure their future, so they can live their lives with confidence. We are committed to acting as fiduciaries for our clients, providing proactive, courteous service that helps clients feel confident about their money. We are a purpose-driven organization, and we want our clients to have much success, to thrive, and give back to their communities.

We pride ourselves on being transparent and communicating in a realistic, straightforward manner. We believe in educating our clients so they are able to make the best decisions for themselves, even if that means having difficult conversations. The team is led by the founder of Opus Wealth, Loic LeMener, who holds both the CFA® and the CFP® designations. Loic is dedicated to serving clients following one simple, but powerful golden rule: if we wouldn't recommend it to our own family, we won't recommend it to our clients! Our goal is to help our clients develop the discipline to help achieve their financial goals through hard work and straight talk.

As an added bonus to this position, we have "secret sauce" to our portfolios that would allow us to thrive in a downturn. Tough financial markets, even a crash, would very likely mean a period of robust growth for Opus.

Opus Wealth Management is seeking a full-time, long-term Associate Wealth Advisor. This role will help Loic with all the "quarterbacking" that needs to be done for his HNW and UHNW clients. The ideal candidate will have experience analyzing clients' estate, tax, and investment planning, and be excited to wear multiple hats. This role will sit in on client meetings immediately and be responsible for debriefing and keeping the client's team (us, CPAs, attorney, etc.) up-to-date and moving forward. Furthermore, this position will be expected to help Loic with research, including software, vendors, tax, estate, and investment research. Candidates that fit into our culture will possess a hardworking and confident personality that thrives working independently. We work in a very transparent fashion; everyone on the team has access to emails, firm numbers, and time spent on tasks. We are a team that believes in ethics and "white glove" client service.

Opportunity:

- Be a Client Champion: Guide and advise our valued clients, building strong relationships and helping them achieve their financial goals.
- Shape Our Knowledge: Contribute to the development of our planning strategies and resources, directly influencing how we serve our clients.
- Become a Tech-Savvy Leader: Play a key role in implementing project management software to streamline our workflows and enhance efficiency.
- Learn from the Best: Receive invaluable mentorship from Loic LeMener, a seasoned professional holding both the CFA® and CFP® designations.
- Chart Your Own Course: Enjoy the freedom to work independently, leveraging your strengths and skills within a framework of clear expectations.
- See the Big Picture: Gain exposure to all facets of our business, from client interaction and financial planning to operations and administration.
- Unlock Your Earning Potential: Benefit from significant compensation opportunities directly tied to your success in driving revenue. (delete "in driving revenue" for second chair role)

Responsibilities:

- Provide dedicated support to Loic by managing relationships with clients, addressing their planning inquiries, and contributing to the firm's intellectual property.
- Quarterback the planning. We have high eight-figure and nine-figure clients that have complex needs. We are the anchor to make everything move forward. This position would be the epicenter of the team responsible for coordinating
- Organize and enhance our planning resources, ensuring timely delivery of valuable insights to clients.
- Help Loic with Tax planning and estate planning research
- Develop a deep understanding of our investment philosophy and portfolio strategies to effectively communicate their value to clients.

- Provide backup support to our operations team (currently three members), demonstrating your versatility and commitment to the team's success.

What You Bring to the Table:

- 4+ years of proven experience in a client-facing financial planning role (Associate Advisor, Paraplanner, Lead Advisor, etc.).
- You're a naturally **curious** human being.
- You tend to ask lots of **questions.**
- **You're coachable,** teachable, and apply what you learn fast.
- You're **intelligent.** We're a clever bunch, so you need to keep up.
- You've got a **track record** of a strong **work ethic.**
- **You love the idea of researching cool/complicated techniques to help clients' lives**
- **You're a big fan of personal development,** and you're constantly working to improve yourself.
- You've got a track record of consistent **performance** that you're proud of.
- You're technically proficient and always looking for technological hacks.
- You have a fan club we can talk to about your previous work
- A bachelor's degree is preferred.

Bonus Points If You Have:

- CFP®, EA, or CPA designations
- Experience with insurance products
- SIE and Series 6 licenses

Compensation & Perks:

- This is a full-time W2 position offering stability with a lot of growth potential.
- $90k-$150k depending on experience & certifications
- A 401(k) plan with a **3% employer contribution** after your first full year, helping you build your own financial security.

- **Enjoy the flexibility of a hybrid role.** While not required, a Dallas-based candidate (or willing to relocate) is highly preferred. Our team is virtual, and this position will have a lot of virtual time, especially after initial training.
- **We do NOT offer health insurance.**

To demonstrate your attention to detail (a critical skill for this role), please do not email your resume directly. Emails sent directly to the firm will be deleted. **Applications are only accepted via this questionnaire:**
https://app.smartsuite.com/form/sctd5tj3/Ri72TKEqr0