



Senior Wealth Management Consultant

Manning & Napier is headquartered in Fairport, NY with regional offices in St. Petersburg, FL and Columbus OH. Founded in 1970, we provide a broad range of investment solutions, as well as a variety of consultative services that complement our investment process. We serve a diversified client base of high-net-worth individuals and institutions, including 401(k) plans, pension plans, Taft-Hartley plans, endowments and foundations. For many of these clients, our relationship goes beyond investment management and includes customized solutions that address key issues and solve client-specific problems. We are currently recruiting for an individual to join our Family Wealth Management Team.

Summary

The Senior Wealth Management Consultant will report to the Managing Director, Family Wealth Management and will support the growth of the Family Wealth Management group primarily by providing comprehensive wealth management services to high net worth clients (\$4 million and above) through the creation of written wealth management plans dealing with financial, estate, and tax planning, conducting client meetings and annual reviews, ongoing plan monitoring, coordinating aspects of the plan with a client's outside advisors, and researching and writing about financial planning related concepts. The goals of the Family Wealth Management Group are to help clients address wealth management needs and increase client retention. This is not a sales position.

Responsibilities

- Work with high net worth clients to identify their wealth management goals and develop strategies to accomplish them primarily in the areas of setting appropriate investment objectives, retirement planning/cash-flow modeling, estate plan reviews and recommendations, tax planning, and insurance advice.
- Conduct client meetings to deliver wealth management recommendations and help the client implement those recommendations with outside advisors.
- Ongoing monitoring of the wealth management plan and annual reviews to ensure the client remains on track to achieve their objectives.
- Research financial planning topics and write pieces on those topics.
- Update and create new marketing pieces for use in cross-selling FWM internally and with clients, as well as helping increase demand for the services overall.

Qualifications

- Bachelors' degree with a minimum of 5 years of financial planning experience and a strong preference for a Certificate of Financial Planning.
- Strong client relationship skills with consultative sales experience as a potential plus, the ability to understand and effectively communicate planning strategies, analytical abilities, and an attention to detail.
- Willingness to travel to attend client meetings

For consideration send resume and cover letter to Greg Howe, Senior Recruiter, Manning & Napier Advisors, LLC, 290 Woodcliff Drive, Fairport, NY 14450 or email ghowe@manning-napier.com. For more information about Manning & Napier please visit our website at www.manning-napier.com.