Wealth Manager Associate

Introduction:

Our firm is ready to expand our team! We are currently in search of a Wealth Manager Associate to help in financial plan development for new clients and to take the lead on servicing several long-standing client relationships. As a growing financial advisory business, we are looking for a seasoned candidate ready to jump into this role with both feet! If you think this job could be for you, please send an email to info@haasfinancialgroup.com with your resume and a short video introducing yourself, describing what makes you the best we can hire and why you would like to join our team. We want someone ready to embrace our small, community-based firm, who takes pride and ownership over their tasks and loves helping people.

About Us:

Haas Financial Group is an RIA-only wealth management firm guiding clients through a well-defined and repeatable financial planning process, with the ability to coordinate the services of all specialized financial professionals in our clients' lives — including estate planners, legal, and tax advisors — with investment management services. We focus on behavioral finance and the human side of our client relationships with a mission to align our client's values, vision, and wealth. Learn more about us and who we serve at *www.haasfinancialgroup.com*

Professional Values:

- ☐ Building and cultivating personal relationships
- ☐ Achieving impactful outcomes for others and themself by being persistent, determined, and accountable
- ☐ A coachable, intellectually curious, lifelong learner

Personal Values:

- ☐ Can work independently, but also enjoys being a part of a team

- ☐ Gets joy out of maintaining relationships with others by being a good listener and communicator
- ☐ Is ethical and always does what is best for the client

Qualifications and Critical Skills

- ☐ Certified Financial Planner™ OR 5+ years of experience in financial services
- ☐ Excel and eMoney software experience
- ☐ Strong organizational skills and attention to detail
- ☐ Excellent written and verbal communication skills
- ☐ Commitment to personal growth with a willingness to learn and be coached
- ☐ Inter-personal skills, technical skills and the desire to be a part of a team
- ☐ Ability to prioritize tasks and handle fast-paced, sometimes stressful situations
- ☐ Identify as an empathetic, problem-solver

Job Responsibilities:

- ☐ Preparing for and assisting with client reviews and service requests through the HFG Client Service Model
- ☐ Attending client meetings with the expectation to lead certain relationships within a short period of time
- ☐ Designing and updating financial planning advice for new clients
- ☐ Executing on internal financial planning and client service workflows
- ☐ Assisting with implementation of financial planning and asset management recommendations
- ☐ Helping draft educational content
- ☐ This position is not a sales position, nor are you expected to source your own clients

Our Hiring Process:

- ☐ Step #1 — Wow us with your resume and short video introduction to you.
- ☐ Step #2 – If we love your submission, one of us will schedule a phone interview to get to know you better

- ☐ Step #3 – If that team member loves his/her conversation with you, we will have you complete the DISC personality profile that helps us all learn how we would best fit together as a team
- ☐ Step # 4 – If we love your responses to step #3, we'll invite you into the office for a formal interview with the team.

Terms of Employment:

- ☐ Starting salary between $80,000 and $100,000. This will be determined by your credentials, which designations you hold, and the years of experience you have leading client relationships
  - NOTE: If you do not have your CFP®, it will be our intent to help you acquire it ASAP.
- ☐ This position will have its own REP ID which, in addition to your salary, will pay you 60% of the revenue generated by the clients that will be assigned to you, once you begin to independently service them. This will begin after your first six months with us, and additional accounts will be added over time as new clients join the firm. This additional revenue is paid once a month.
  - NOTE: If you have a client-base you already serve and wish to bring them to Haas Financial Group to continue servicing, we will discuss how to best navigate that situation, as it is our intent for you to have the capacity to begin servicing several of our existing clients within the first 6-months of joining us, and many new relationships as we grow.
- ☐ Bonus potential through year-end profit sharing for all team members
- ☐ Employer Provided Benefits include:
  - Healthcare (100% of employee cost covered) with optional Health Savings Account
  - Ability to add spouse and dependents (covered at 50% of cost)
  - Optional vision and dental insurance at your own expense
  - 401(k) plan with 3% safe harbor match (both pre-tax and post-tax saving options)
- ☐ Paid time off and holidays
- ☐ Flexibility to work-from-home part-time

Our Thought on Who Should Apply:

Anyone who loves serving others and is genuinely interested in growing as a person and a planner. Someone who enjoys a mix of working independently and being part of a team, who takes great pride in helping others, and has a great personality and sense of humor. You should have a passion for the human side of financial planning relationships, where empathy, compassion and clear communication help forge positive, long-lasting relationships.

Location:

We are located in Kutztown, PA and this is a hybrid position. Face to face interaction is important for working as a team and for some of our clients. However, our process and use of technology at all stages of our relationships make us fully functional for a remote working environment. The expectation will be to utilize our joint office space no less than as necessary for clients, while having flexibility to work remotely as well based on your personal situation. As a company we value work-life balance as long as our clients are served, and our work is completed in a timely manner.

Next Steps

To apply, please send your resume and any other materials you think would be helpful — such as letters of recommendation or LinkedIn profile — to info@haasfinancialgroup.com