Audible Wealth
YOUR FINANCIAL PLAYBOOK

Senior Wealth Advisor

Audible Wealth Management is a leading financial advisory firm based in Silver Spring, Maryland, just outside of Washington D.C., with ambition to become a preferred career destination for talented professionals.

Our primary objective is to build prosperous lives as we assist clients in reaching their goals. We believe constructing a dynamic team will expand our ability to provide the best possible service to our clients.

We are hiring a Senior Wealth Advisor to join our talented team to help us continue to deliver great value to new and existing clients.

Duties and Responsibilities

We are looking for a proven professional to offer comprehensive financial planning investment advice to existing and incoming clients, also dedicated to delivering elite client experiences. The Senior Wealth advisor will partner closely with our wealth team to help meet the financial needs of clients, both now and long term. The Senior Wealth Advisor is a fiduciary advisor, placing the clients' interest first.

Senior Wealth Advisor Responsibilities

- Work directly with clients on implementing financial plan and revisions for future life events.
- Collaborate with wealth planning team to manage client portfolios, and research financial solutions to fit client needs.
- Build customized financial plans focused cash flow, taxes, retirement, estate planning, investment plans, and risk management.
- Cultivate relationships with prospective clients.
- Master referral creation and acquire new clients by converting warm leads.
- Adhere to all regulatory and compliance rules, procedures, policies.
- Partner with internal team to ensure client service is a top-notch experience.
- Conduct client review session to stay up to date on material changes in the clients' household.

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Qualifications

Required Qualifications

- Minimum of **5 years** in a client-facing role in the financial or accounting services field.
- Holds Series 6 or 7, Series 63, 65, or 66 active licenses.
- Existing book of business with managed clients.
- Prior experience with wealth planning FINTECH like CRMs, financial software.
- Clean FINRA record. No regulatory issues.
- Proven track record of sales and service role in the financial industry.
- Bachelor's degree.

Preferred Qualifications

- CFP, CFA, or CPA.
- Graduate degree – JD, MBA.
- Active Life & Health Insurance license.
- Proficiency in Microsoft Word, Excel, PowerPoint, Google Suite, CRMs, trading platforms, etc.
- Organized with strong attention to detail.
- Proven ability to build and maintain relationships with centers of influence such as attorneys, accountants, and business advisors.
- Work in teams as well as create your own individual career path.
- Serves as a thought leader and internal resource for wealth management topics.

How to Apply →

Interested applicants should send their resumes with a cover letter to **info@audiblewealth.com.** We will contact you if we believe your qualifications meet our needs. Thank you!