



## BUTTONWOOD *Financial Group*

### **Wealth Management Strategist: Level 2**

Buttonwood Financial Group, LLC is a fiduciary focused Multi-Family Wealth Management firm located in the heart of Kansas City. We offer a Team environment, a reputation for excellence, established clients and excellent growth potential designed for you to reach your personal and career goals as you help our clients reach theirs.

Our associates are as important to us as our clients, and we work to provide both with a great atmosphere and learning environment. We value our employees and we take pride in recognizing their outstanding talents and efforts. We are committed to the delivery of superior quality services based on a fiduciary foundation of honesty, integrity and ethical treatment.

We are currently seeking a Wealth Management Strategist (WMS) who is familiar with the financial planning / client service industry and is dedicated to helping take our company and community to the next level. This position provides the opportunity for both technical financial planning as well as implementation and execution of financial planning strategy (tax, cash flow, estate, business, education, investment, etc.). You will work as a member of our Team preparing for and attending client meetings with our Lead and/or Senior Advisors. Following meetings, you will work with our Client Service Team to implement resulting strategy.

This position requires the ability to comfortably interact with affluent multi-generational families, provide advice and make recommendations for clients' financial lives. Supervision is from Lead and Senior Advisors.

#### **General Responsibilities**

- Participate in client and prospective client meetings with Lead/Senior Advisors
- Lead client implementation and document signing meetings
- Work with clients to analyze, research, and implement solutions in their individual financial situations
- Serve as a member of our Investment Policy Committee
- Prepare and make recommendations for client financial plans, including entering data and running reports using financial planning software
- Prepare and make recommendations for client investments, including the creation of investment policy statements and portfolio reports
- Continuously monitor clients' financial situations with detail, accuracy and the ability to look at the big strategic financial picture
- Prepare, coordinate and follow through on communications with Buttonwood clients

- Use automated processes, e-files, CRM and other technology tools to manage and track client strategy
- Manage and serve as first line support for our online client portal and financial planning software
- Establish and maintain online connections with financial institutions for financial planning software
- Have a dedication to continued education and establishing relationships with strategic partners
- Be a proactive and supportive member of our community

### **Qualifications**

- Bachelor's Degree, CFP® certificate preferred or eligible to sit for CFP® exam
- Knowledge of and experience in the financial industry, regulations, financial planning and investment management
- Strong verbal and written communication skills
- Demonstrate excellence in organizational and time management skills
- Working knowledge of CRM, financial planning and investment management software
- Professional, positive and knowledgeable demeanor
- Be able to meet both internal and client deadlines and expectations

### **Benefits**

- Salary with incentive performance-based pay program
- Career track available with opportunities for advancement and equity ownership
- Mentorship and learning opportunities
- Paid medical, disability and life insurance coverage
- Retirement savings plan with company match
- Paid holidays and vacation
- Other benefits include: paid time off for volunteer work, reimbursement for approved educational courses and industry designations, tax prep services, use of software or systems for personal financial planning and asset management and more.

We are an equal opportunity employer. Selected candidate may be required to pass a drug test and background check.