

EMPLOYMENT OPPORTUNITY

Client Manager

Summary

Cornerstone Advisors, Inc., a comprehensive wealth management firm for high net worth individuals, families, and their related entities has an opening to join their team as a Client Manager responsible for serving our clients extraordinarily well and for retaining new client relationships for us to serve. You will be a member of the client management team caring for the financial assets of our clients in a thoughtful and prudent fashion.

Responsibilities

Main responsibilities of the individual in this position:

- Conduct ongoing business development and marketing activities to retain new clients
- Identification of a client's unique goals and objectives
- Recommend, develop, implement, and manage strategic wealth management solutions to meet goals and objectives
- Coordinate with clients' outside advisors, including CPA and attorneys, as part of the strategic financial plan
- Manage cash flow, income and transfer tax planning, accounting, asset purchase/sales, real estate holdings, long-range strategic forecasting, estate planning, philanthropy, and investment and risk management activities for assigned individuals, families and related entities, including periodic reporting
- Review quarterly financial reports for assigned individuals, families and related entities, focusing on cash planning, strategic planning and investment performance reporting
- Keep abreast of general economic, business and financial conditions and their impact on a client's overall situation

The successful candidate will have skills and experiences including:

- Bachelor degree in finance or other business-specific subject
- Advanced degree and/or a professional designation in wealth management-related field
- 8+ years of experience in personal financial planning, investment counseling, tax, risk management, or financial accounting
- Proven track record generating new client relationships and serving relationships with high net worth clients
- Demonstrated experience understanding a client's unique financial situation, providing

Skills

appropriate advice and solutions, and exhibiting financial leadership. Excellent interpersonal skills and client face-to-face relationship building skills

- Solid time management and organizational skills
- Exhibits a commitment to lifelong learning, encourages others to do so, and continues to grow technically and interpersonally to perform job at the highest levels
- Intermediate knowledge of Microsoft Office suite of products, with an emphasis in Excel.
- Ability to work independently and collaboratively
- Effective and professional verbal and written communication
- Evidence of being a team player and supportive colleague with strong interpersonal skills
- Demonstrates and promotes integrity in an environment of mutual trust and respect
- Maintains the utmost discretion in working with sensitive and confidential information
- Sense of ownership and pride in work with a commitment to excellence

Process

Cornerstone's Application Process

We are looking for top talent to complement our team. We offer a challenging and fun work environment, competitive salary, and an excellent benefits package, including medical, dental, vision, 401K, life insurance, ownership opportunity, work-life balance, and flexible spending plan.

Please send cover letter and resume to:

Kristin Reed
Managing Director, Human Resources
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www.buildbeyond.com