Client Advisor

Job Description:

The Client Advisor ("CA") has responsibility for managing existing client relationships, either working with a Senior Client Advisor or on their own. The individual will work within the Advisory Services team, leveraging the support of other advisors, associates, portfolio managers, and financial planning specialists as needed.

Duties and Responsibilities Include:

- Work independently and with Senior Client Advisors to manage client service, including scheduling, preparing for, participating in, and leading client meetings
- Prepare financial planning deliverables for clients and help to manage a team of Financial Planning Associates in doing the same
- Collaborate with portfolio managers on the investment management of client portfolios, which include public and private investments
- Work independently and with Senior Client Advisors on the client relationship management process, including regular and on-going client contact and communications
- Assist in overall management of process, preparation, and follow-up for client meetings
- Work with WMS team to develop, enhance and/or refine company's procedures and policies
- Complete Special projects as needed

The CA is meant to be a support role with mentoring from Senior Advisors on larger client engagements, with opportunities to lead other engagements. Successful advisors will earn more client responsibility with experience and tenure at WMS Partners.

Desired Skills and Experience:

- 3 to 7 years of relevant industry experience preferred
- Excellent written and oral communication skills
- Client first attitude, professional demeanor, personal integrity and an understanding of fiduciary responsibility
- Ability to multi-task and manage time effectively
- Self-motivated, confident, detail-oriented, and analytical
- Willingness to take on additional operational responsibilities as needed

Qualifications:

- Bachelor's Degree from an accredited college or university (required)
- Demonstrated desire or progress toward the CFP, CFA or CPA designation
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as experience with financial planning, client relationship management (CRM) and portfolio management (PM) software

Salary and Benefits:

- Pay/benefits are competitive based on industry standards.
- Bonus eligible
- Benefits including 401(k)/profit sharing plan, health insurance, paid holidays, vacation and tuition assistance
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities, if applicable. Support amount will be determined by management each year.

About WMS Partners:

Founded in 1993 and headquartered in Towson, MD, WMS Partners has over 50 employees and currently manages over $3.6 Billion in assets for approximately 400 families.

We are a fee-only financial advisory and investment management firm. We customize our advice to each client, providing them with recommendations and implementation assistance to meet their specific goals and needs. Our client's families consist of professionals, retirees, corporate executives and business owners. The Firm's continued growth is primarily due to referrals from its existing client base.