ALLODIUM®
INVESTMENT CONSULTANTS



## ABOUT ALLODIUM:

We provide comprehensive wealth and fiduciary management services to help individuals and small organizations achieve their goals and simplify their financial lives. We launched Allodium to provide the best financial advice and personal service to a limited number of clients, mostly in the Twin Cities area. We believe exceptional advice avoids conflicts of interest to align with our clients' best interests. To this end, Allodium is a fee-only Registered Investment Advisor (RIA) independent from banks, brokerage firms, mutual fund companies and other financial service providers.

We believe in building an open and inclusive culture where we embrace others as their authentic selves. Applicants will receive consideration without regard to race, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age or veteran status.

To learn more about Allodium, please visit our website at www.allodium.com.

## JOB PURPOSE:

Allodium seeks a full-time *Associate Wealth Advisor* who is prepared to help more senior Wealth Advisors provide comprehensive financial planning, investment consulting and related wealth management services to affluent individuals, families and organizations. The ideal candidate will join us with the knowledge, experience, skills and desire required to independently serve smaller clients within the first year.

## RESPONSIBILITIES:

**1)** ***Wealth Advisor & Service Support – 80%*:**

- Assist ***primary*** Wealth Advisors for individuals, families and small organizations in delivering exceptional advice and service to achieve high client satisfaction and earn referrals.
- As readiness and ability permit, serve as ***primary*** or ***secondary*** Wealth Advisor for appropriate smaller client relationships.
- Assist with monitoring each client's financial situation, goals, risk tolerance, issues, etc. to provide comprehensive, tailored and proactive financial planning and wealth management advice.
- Assist with security trading efforts, as needed.
- Assist with firm's efforts to continually improve financial planning, wealth management and client service processes.
- Help plan and execute client service communications and events like periodic newsletters, market commentaries, educational workshops, client recognition events, etc.
- Independently manage or assist with assigned projects related to client service, financial planning and wealth management services.
- Serve as member of firm's Client Service, Financial Planning, Fiduciary Consulting and Investment Committees.

**2)** ***Business Development – 20%:***

Assist with identifying and onboarding prospective new clients, including the preparation and presentation of financial plans and proposals using multiple software tools.

## MINIMUM QUALIFICATIONS:

- BA or BS degree in financial planning or related field.
- CFP® designation or on track to gain CFP® designation within the first year.
- Strong desire to pursue a Wealth Advisor career track.
- Ability to work full-time 40-hour-per-week schedule Monday - Friday.
- Ability to work in Minneapolis office several days per week with remote work on other weekdays.
- Strong client service ethic.
- Unquestionable personal and business ethics and integrity.
- Preference for executing consistent service processes.
- Excellent written and verbal communication skills.
- Pleasant, professional and friendly manner with excellent interpersonal skills with clients and peers.
- Naturally team-oriented and collaborative in pursuit of shared responsibilities and goals.
- Strong analytical skills related to wealth management and financial planning.
- Highly flexible with ability to easily adapt to changing environment.
- Highly proficient with Microsoft Office and other business software applications and eager to learn more.

## OTHER:

- Financial planning degree.
- 2+ years of experience in the financial services industry, ideally serving clients directly.

## SALARY & BENEFITS:

Starting position level and base salary commensurate with experience and qualifications. Bonus opportunity is available. Competitive benefits include paid time off and medical, dental, vision, life and long-term disability insurance and 401K with match opportunity.

## HOW TO APPLY:

Please submit the following items to info@allodium.com for consideration:

1) Brief letter of introduction explaining your interest in this position and relevant key qualifications.
2) Resume.
3) Minimum salary and benefit requirements.