Wealth Advisor

(Cincinnati, OH)

Madison
WEALTH MANAGEMENT

Do you have a passion for helping others? Do you work best in a team-based environment and enjoy the challenge of continually looking for ways to improve? If so, let's talk. As Madison continues to grow, we are looking to expand our Wealth Advisory team with advisors dedicated to their craft that embody the highest standards of teamwork and client service.

Madison Wealth Management serves as a trusted advisor to over 350 families representing nearly $1.3 billion in assets under management. Since our founding in 2000, Madison's professionals have provided objective, high-quality advice to help successful people and organizations build and maintain their wealth. We pride ourselves in our team-based approach and commitment to excellence in client service and advice. Our team serves a national client base from offices located in Cincinnati and Washington, D.C.

JOB DESCRIPTION:

As a Madison Wealth Advisor you will serve as the firm's primary point of contact for a select group of clients. In this critically important role, you will manage client relationships providing sound financial planning advice and counsel and work closely with all members of the Madison team to exceed client expectations. You will be expected to help grow Madison's business through the efficient use of your time with clients, prospective clients, centers of influence and community involvement, making an invaluable contribution to our firm.

DUTIES AND RESPONSIBILITIES:

- Develop and manage existing client relationships, including ongoing regular client contact and communications
- Communicate our value proposition to prospective clients and establish Madison as their trusted advisor
- Implementation of financial plans including coordination of estate, insurance, and tax strategies
- Work with the firm's portfolio management team to incorporate clients' investment strategies with their planning objectives
- Develop and expand relationships within the community and with trusted service providers
- Must demonstrate a commitment to extraordinary client service through professional excellence, the highest ethical standards, and the effective use of available resources

Qualifications:

- Bachelor's degree and CFP designation required
- Additional credentials are desirable including CFA, CPA, and JD.
- Minimum 5 - 7 years in financial and/or estate planning related work, preferably in relationship management
- Demonstrated ability to develop and manage client relationships and develop new business opportunities
- Proven ability to network with prospective clients and centers of influence
- Possess active listening and critical thinking skills
- Client first attitude
- A team player, with strong coaching and leadership skills
- Desire/ability to work successfully in an intimate, fast-growing, entrepreneurial company

Interested applicants should forward cover letter and resume to HR@madisonadvisors.com

Madison Wealth Management is an Equal Opportunity Employer. We do not discriminate on the basis of race, religion, color, sex, gender identity, sexual orientation, age, non-disqualifying physical or mental disability, national origin, veteran status or any other basis covered by appropriate law.