FIDATO WEALTH®
COMPREHENSIVE FIDUCIARY ADVICE

Associate Wealth Advisor – Full Training & Development Program Available

Starting Compensation is $45,000 to $100,000 – based upon experience, certifications/licenses, and client responsibilities that can be assigned.

We are a high growth, fee-based Financial Planning and Wealth Management Firm that has excellent client retention, continuous prospective clients, and who is committed to making a positive impact in the lives of our team members, clients, and the communities we serve. As a leading RIA, and we are looking for top notch individuals to partner with that want to grow to the next level. We are invested in each team member's growth and success and have career paths, company paid development, a laid out path to equity, and a very talented team that is sincerely interested in helping others achieve their goals. We have 5 partners in our firm currently.

Fidato Wealth has been named to:

- Financial Advisor's Top Registered Investment Advisers for 6 years in a row
- WealthManagement.com's Thrive Award
- WealthManagement.com's RIA Edge for the fastest growing advisors nationally and in the state.
- The founding principal and other partners have been featured in The Wall Street Journal, CNBC, Barron's, Fox 8, and other national and local venues.

This position is ideal for someone with:

- 2+ years RIA advisory experience.
- Experience Co Leading client relationships is preferred but not necessary.
- Wants to handle the financial planning needs of the firms less complex households which range from $400,000 to $750,000 in AUM, and Co Lead their meetings with and under the guidance of one of the firm's partners.
- Wants to grow to be able to independently service existing client relationships if that is not a current ability.
- Wants to grow to be able to Co - lead the firms high net worth households, under the guidance one of the firm's partners if that is not a current ability.

- Wants to grow to be able to be assigned qualified and warm prospective clients who have reached out to the firm if that is not a current ability.
- Wants to team up with an industry leader who provides comprehensive and world class Financial Planning and Wealth Management to clients
- Wants to be part of a Fee Based RIA, and have a Fiduciary duty to their client across all advice
- Wants to grow, work hard, and put the time in needed to be very successful
- Wants a virtually uncapped income opportunity via a compensation plan that rewards advisors for both retaining and bringing on new clients.
- Has the required licensing or certification for the position (see Job Requirements section below)
- Wants to work within a great team of people in a positive environment towards a common goal

We were founded in 2008 on our core value - our Fiduciary duty. We prescribe to and were founded on industry best practices, while working with one of the most sought-after industry consultants who works with the best of the best RIA firms nationally. We have excellent systems, technology, institutional investments, and strategic relationships, all to put us in a position to provide proactive wealth management that is second to none. We are looking to partner with others who are an excellent cultural fit.

Summary of Initial Responsibilities:

- Assists Lead Wealth Advisor in client meetings with meeting participation and ensuring follow up planning items are scheduled and handled proactively
- Co leads relationships with experienced Lead Advisors, while learning how Fidato delivers high impact and life changing wealth management
- If a current ability, independently service the firms less complex households.
- If a current ability, be assigned qualified and warm prospective clients who have reached out to the firm and co lead prospective client meetings
- Prepares reports, financial analysis, and documents for client meetings.
- Coordinates with clients to ensure their wealth planning objectives are completed successfully and proactively.
- Communicates professionally with clients in writing, on the phone, video conference calls, and in person.
- Supports the company's strategic initiatives.
- Performs other duties and projects as needed.

Job Requirements and Qualifications:

- 2 Years RIA Advisory experience
- Some experience Co Leading Client Relationships is preferred

- Open to learning and implementing Fidato's unique approach to delivering proactive wealth management.
- Independent and action driven with attention to detail and persistent follow-up.
- Desires to grow and eventually lead households under the direction of a senior team member.
- Bachelor's degree, preferably in a related field.
- Candidate must be proficient with Microsoft Outlook, Word, and Excel.
- Ability to work independently with minimal supervision.
- Must have excellent oral and written communication skills.
- Candidate must hold one of the following active certifications/licenses:
- *Series 65, **or***
- *Series 7 AND Series 66; **or***
- *Certified Financial Planner Professional™ (CFP®), **or***
- *Chartered Financial Consultant (ChFC)*
- CFP is preferred but not required. If not held, must be willing to obtain in the future.
- Ohio Life/Health insurance license is preferred but not required.

Compensation

Total starting compensation ranges from $45,000 to $100,000, based upon experience, certifications/licenses, and client responsibilities that can be assigned. Compensation consists of salary, incentive pay, and profit sharing.

Benefits

We have an outstanding benefits package which includes: Medical, Dental, R/X & Vision Insurance, HSA, 401k with Profit Sharing, Cash Balance Plan, Company Paid Disability Insurance, Flexible Time Off, 5 Week Sabbatical After Every 5 Years of Service, Flex Time, Company Paid Development Programs, and Paid Certifications and/or Licensing. Benefits also include a positive work environment and great company culture.

Hybrid Work Option

New employees work in the office due to the training required. We do offer a hybrid work option for employees, once they are fully trained, that allows team members to work up to 2 days per week from home, provided that firm and individual goals are met.

Next Steps

If you are driven to succeed and are looking to be an integral part of an outstanding company, we would enjoy hearing from you. **Submit your resume today to tony@fidatowealth.com!**

Job Type: Full-time

Salary: $45,000.00 - $100,000.00 per year

Benefits:

- 401(k)
- 401(k) matching
- Dental insurance
- Flexible schedule
- Health insurance
- Health savings account
- Paid time off
- Parental leave
- Professional development assistance
- Retirement plan
- Vision insurance

Physical setting:

- Office

Schedule:

- Day shift

Education:

- Bachelor's (Required)

Experience:

- Advisory: 2 years (Required)

License/Certification:

- Series 65, or Series 7 AND 66, or CFP, or ChFC (Required)

Work Location: One location