GRUBB
WEALTH MANAGEMENT

Title: Wealth Manager

Location: Cincinnati & Columbus, Ohio

Job Description: **JOB SUMMARY**

The Financial Planner is responsible for the last five of six steps in the CFP Board's Financial Planning Process. This individual interacts with clients on a daily basis to gather information, analyze information, develop recommendations, implement recommendations and monitor the financial plans of their clients. The Planner collaborates with one or more Wealth Managers in the firm to deliver expert, comprehensive financial advice to their clients.

JOB DUTIES

- Participates and conducts client meetings
- Prepares the Financial Planning recommendations
- Collaborates with members from each business line to best serve the client
- Manages accuracy of internal Client Relationship Management (CRM) software
- Implements Financial Planning recommendations
- Monitors the Financial Plan and communicates with clients
- Updates Financial Planning recommendations
- Grey/overlapping tasks between department areas and all other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- CFP Certificate or equivalent certification
- Relevant Educational Background (Finance, Accounting or Business Administration)
- 3 years financial services industry experience
- Series 65 (or equivalent) attained within 120 days

PREFERRED EXPERIENCE / QUALIFICATIONS

- Previous financial planning experience
- Proven leader and influencer in the marketplace
- Keen attention to detail

TECHNICAL SKILLS

- Microsoft Office proficiency
- CRM experience preferably Redtail
- Financial Planning software experience preferably eMoney