VERUM PARTNERS

POSITION FOR HIRE
ASSOCIATE

JOB SUMMARY

Associate works with a team of wealth management professionals, in an ensemble structure, to deliver unbiased advice and solutions to clients' most important financial decisions. The associate will gain exposure to investments, financial planning, and operations through a support role that will build the foundation for a great career at a growing wealth management firm that is focused on raising the bar on the industry.

FIRM OVERVIEW

Verum Partners was founded in 2019 as an employee-owned, independent, fee-only registered investment adviser (RIA) focused on improving lives through true partnership. At Verum, we "Start With Why" when making decisions. We apply this framework to deliver an abundance of wealth management services including comprehensive financial planning and investment management services. As of 12/31/20 we manage approximately $250M and provide advice on another ~$50M, making us one of the largest fee-only firms in Charlotte, NC. And we're just getting started! To learn more about our team, our services, our process, and how we think, visit our website: https://verumpartnership.com/

CONTACT

vmain@verumpartnership.com

Duties and Responsibilities

- Prepare investment and financial planning materials for current and prospective clients
- Assist with financial planning modelling and scenario analysis
- Generate quarterly and ad hoc performance reports
- Review portfolio allocations with Investment Policy Statements (IPS) targets
- Coordinate portfolio rebalancing, tax loss harvesting, and investment strategy changes
- Organize alternative investment data and update reporting system quarterly
- Research one-off financial planning and investment-related topics
- Maintain data aggregation integrations for outside accounts that feed into our systems
- Assist Director of Client Partnership with maintaining CRM database, client files, compliance reports, trading, and assisting with ongoing client requests
- Review current Investment Policy Statements and assist with creating and executing for clients
- Improve systems, provide suggestions, and help the team achieve greater efficiencies
- Oversee projects to improve firm infrastructure such as trading platforms, CRM workflows, etc.

Skills and Expectations

- Basically, we're looking for a rockstar!
- We need a doer who can help continue this excellent momentum at Verum
- Exemplify the Verum Values: Candor, Competence, Compassion
- Bachelor's degree (in financial planning or business a plus but not required)
- Working towards or obtained a CFP or CFA preferred
- 2 year minimum work experience in wealth management or investment management
- Strong desire to help others
- Excel skills and tech-savvy a plus
- Experience with Orion, Wealthbox, E-Money, and Money Guide Pro a plus

APPLICATIONS DUE: 2/15/2021