**Position Title:** Wealth Advisor

**About Our Firm:** Legacy Advisors, LLC is a premier Wealth Management firm headquartered in Plymouth Meeting, PA. We are a well-established and growing RIA with expertise in investment and wealth planning for ultra-high-net-worth ($25M+) individuals and business owners. As an independent, fee-based firm, we are committed to helping our clients achieve peace of mind by serving them with the highest level of integrity and ensuring that their business and personal affairs are always in order. The common trait they share is too little time to take care of the strategic and tactical planning needed to secure their financial objectives.

**Position Summary:** This position is responsible for working with the top 1% of high-net-worth individuals to help fulfill their lifetime objectives embracing their value system, love of family, and commitment to their community. As a Client Advisor, your work will encompass estate and business planning, asset planning, income tax planning and personal financial planning. We are seeking a candidate who has an outgoing, poised, and persuasive communication style that emphasizes the importance of building relationships with individuals and teams. A sense of urgency and confidence to handle a variety of challenges, a full commitment to the success of our firm, and high standards of achievement are expected as a Client Advisor. In this position, you will deliver outstanding advice to your existing clients to enable them to make informed decisions about their current planning objectives. In doing so, you will build deep relationships with existing clients as well as their advisors enabling you to drive new business development activities.

**Position Responsibilities:**

- Gain deep knowledge and understanding of a client's holistic plan including balance sheet, lifetime plan, cash flow, business continuity, estate plan, philanthropic planning, and investment portfolio.
- Develop relationships with centers of influence to drive new business activities.
- Support Senior Advisors with complex cases and lead relationship management.
- Responsible for oversight of the holistic relationship and ensure that all strategies are on track.
- Analyze and review current and proposed plans with clients.
- Provide guidance to internal teams regarding overall case strategy and implementation.
- Coordinate execution with technical experts internally and externally.
- Manage and review all presentation materials and correspondence with clients.

**Background Requirements/Preferences:**

- BA or BS degree
- Minimum 3-5 years Industry related experience/CFP or Industry Licensing preferred.
- Ambition, high energy, and strong desire to succeed.
- Ability to effectively work with multiple personnel in a team environment.
- Ability to take initiative with a competitive drive to accomplish goals.
- Excellent communication and relationship building skills.
- A strong work ethic. Takes ownership of actions and responsibilities.
- Ability to multi-task and problem solve in a fast-paced environment.
- A high degree of personal integrity.
- Adheres to and promotes corporate culture and values.

**Additional Information:**
Base salary coupled with a performance-based bonus and benefits package.

**Contact Information:** Legacy Recruiting @ **LegacyRecruiting@legacyadvice.com**; Firm website: **www.legacyadvice.com**.