



## **Position: Financial Advisor**

Bond&Devick Wealth Partners is seeking an individual who aspires to work in a fast-paced, team-oriented environment where integrity and respect for our clients and each other is of utmost importance.

### **Bond&Devick Wealth Partners Overview**

*Value in Values—committed to what you care about™*

At Bond&Devick we sincerely care about our clients and their family. We aim to alleviate our clients' financial stress so they can focus on what makes them happy. Since our firm's establishment in 1982, we are proud to have the opportunity to help so many clients plan for and reach their dreams.

We are unique in that we use Goals-Based Financial Planning, to measure progress towards your goals, driven by your values. We believe our clients' investments should be aligned with what is important to them.

We strive to be a leader in our industry by putting our clients, our team, and our community above all else. In 2015 we became the only financial planning firm in Minnesota to earn a BCorp Certification. It is a continuous governing process that monitors and validates that we "walk the talk".

### **Bond&Devick Wealth Partners Core Values**

*The Cornerstones of Bond&Devick Wealth Partners*

- Client-driven: We deliver superior client service using our value in values, goal-based financial planning platform
- Team-oriented: We support and treat team members with respect
- Our Impact: We strive to make a difference by being a leader in SRI investing, volunteering, charitable giving, and our BCorp certification

### **Bond&Devick Wealth Partners Employee Value Proposition**

- Culture – positive, rewarding, values driven
- Work – meaningful and rewarding
- Team – supportive
- Growth – individual (training and development) and organizational (career potential)
- Life – work/life balance
- Benefits – monetary and non-monetary

### **Client Responsibilities**

- Deliver the Bond&Devick Client Experience
- Present financial plans
- Conduct client meetings
- Respond to client questions and service requests
- Attend firm client and volunteer events

- Team Responsibilities**
  - Work with Wealth Management and Operation Teams
  - Work with Advisor team to collaborate and ensure consistency
- Firm Responsibilities**
  - Understand and support the firm's vision, mission, and strategy
  - Engage in teamwork and teambuilding
  - Integrate into the firm's culture
- Growth Responsibilities**
  - Support Partners by creating presentations and materials for business development meetings
  - Attend business development meetings with Partners and take responsibility for follow-up tasks
  - Help maintain and grow key business contacts/COI's
  - Conduct prospect meetings
- Skills Required**
  - Minimum 5 years lead advisor experience, preferably with an RIA
  - Extensive knowledge of the comprehensive financial planning process (retirement planning, investments, budgeting, taxes, risk management, and estate planning)
  - Exceptional communication (written and verbal)
  - Strong attention to detail
  - Client experience oriented
  - Ability to work with industry experts (Insurance, tax, estate, etc.)
- Technology**
  - Proficient in Microsoft Office (Word, Excel, PowerPoint, Outlook)
  - Knowledge of custodial platform (Schwab), portfolio management (Morningstar and Money Guide Pro), BNA Tax Software, client reporting (Black Diamond) and CRM (Redtail)
- Degrees/Designations**
  - Bachelor's degree required
  - CFP® designation required
- Compensation**
  - Total compensation based on experience and education
- Benefits**
  - 401k Retirement Plan Match
  - Quarterly Employee Incentive Profit Sharing
  - Group Health and Dental, HSA, FSA
  - Group life, long-term disability, AD&D insurances
  - Paid Time Off: 120 hours/weeks per year for first 4 years
  - 12 days plus up to 6 half days paid holidays
  - Work-Life flextime
  - Charitable match
  - Wellness, Sustainability, and Technology/remote office reimbursement programs

- Paid professional memberships, conferences, and training
- Cell phone reimbursement of \$75/month
- 2-week Sabbatical after 5 years of service

**Hours**

- Full-time: Monday-Thursday 8am-4pm, Friday 8am-3pm

**Other**

- 90-day orientation period
- Non-solicitation and non-disclosure contract
- Criminal background check

For more information about our firm, visit our website at [www.bondanddevick.com](http://www.bondanddevick.com). Please email your cover letter and resume to Kristine Bisanz at [kris@bondanddevick.com](mailto:kris@bondanddevick.com).