



### **Position: Associate 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**

We are a goals-based, comprehensive, fee-only wealth management firm located in St. Louis Park, MN. Since 1982, our emphasis has been on helping our clients reach their goals by using Goals-Based Financial Planning. We have a longstanding engagement and commitment to our community, and we were the first Certified BCorp financial planning firm in Minnesota. We deliver value in values by aligning our clients' goals and values with their investments.

#### **Client Responsibilities**

- Assist with presentation preparation and materials for client meetings
- Attend client meetings with Lead Advisor and assist with follow up
- Respond to-client questions and service requests

#### **Team Responsibilities**

- Work with Wealth Management and Operation Teams
- Support Lead Advisors

#### **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**

- Draft financial plans
- Perform asset allocation analysis necessary for client onboarding and portfolio reviews
- Create custom analyses of financial decisions
- Lead for prospect data gathering and plan development for client onboarding process

#### **Skills Required**

- Exceptional communication (written and verbal)
- Excellent technology aptitude
- Focus on attention to detail
- Client experience oriented

- Skills Being Developed**
- Knowledge of the financial planning process
  - Knowledge of planning areas including financial planning, investments, budgeting, taxes, risk management and estate planning
  - Communicating with clients in an effective manner
  - Working with other experts (Insurance, tax, estate, etc.) for clients to ensure their complete financial picture is in order
- 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) is preferred
- Education**
- Bachelor's Degree required
  - Desire to attain CFP® designation
- 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 reimbursement programs
  - Paid professional memberships, conferences, and training
  - 2-week Sabbatical after 5 years of service
- Hours**
- Full-time: Monday-Thursday 8am-4pm, Friday 8am-3pm
- Other**
- 90-day probation
  - Non-solicit contract

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).