Position: Wealth Management Director

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, our BCorp certification, and being a PRI signatory

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

- Delivering the Bond&Devick Client Experience
- Delivering the financial plan process
- Conduct financial planning meetings
- Respond to-client questions
- Attend firm's client and volunteer events

Team Responsibilities

- Lead and develop the Wealth Management team
- Work with Advisors and Operations team
- Assign prospects to advisors
- Monitor and manage Wealth Management workflow

Firm Responsibilities

- Understand and support the firm's vision, mission, and strategy
- Understand and support firm's core values and value propositions
- Engage in teamwork and teambuilding
- Integrate into the firm's culture

Growth Responsibilities

- Support partners by updating opportunities and preparing reports for business development meetings
- Attend business development meetings with Partners and take responsibility for follow-up tasks
- Help maintain and grow key business contacts
- Conduct prospect meetings
- Define technology needs for planning and advisors

Skills Required

- Excellent knowledge of the financial planning process and strategies
- Exceptional communication (written and verbal)
- Team management experience
- Excellent technology aptitude
- Focus on attention to detail
- Client experience oriented
- Experience in financial services industry, preferably an RIA firm

Skills Being Developed

- 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)

Degrees/Designations

- Bachelor's degree required
- 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
- 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-solicit contract

For more information about our firm, visit our website at www.bondanddevick.com. Please email your cover letter and resume to Kristine Bisanz at kris@bondanddevick.com.