

**Advisers
Investment
Management, Inc.**

Experience the Fiduciary Advantage...

Providing a Margin of Safety

Director of Wealth Management

Employer: Certified Public Accounting Firm

Location: Colorado Springs, CO

Compensation: Salary with transition to unlimited income potential

Job Description:

Deliver fee only wealth management services to the clients of a well established CPA firm. Assist clients in defining goals and objectives, setting asset allocation policy, and selecting investment portfolio. Perform client service activities. Integrate wealth management marketing into firm's existing campaigns and plans. Educate and train the firm's staff about wealth management and how to identify opportunities with clients. Develop goals for market penetration, assets under management, revenue, and client retention.

Requirements:

Bachelors Degree with the Certified Financial Planner Designation. A minimum of 3 years experience delivering financial planning and wealth management services to clients. Clean compliance record. Share the investment philosophy of Advisers Investment Management, Inc. (strategic global asset allocation implemented using active and passive management).

An existing book of business that could be transferred is a plus.

Contact:

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Providing a Margin of Safety

with an investment process that emphasizes downside protection as well as upside potential