WILLIS JOHNSON & ASSOCIATES
STRATEGIC WEALTH MANAGERS

Wealth Manager

The Wealth Manager is the lead advisor on client relationships at the firm. This includes overseeing the preparation and implementation of client financial strategies, plans, and analysis independently and at times with the support of a Financial Planning Analyst or Associate Wealth Manager. The Wealth Manager will conduct Financial Planning Reviews for clients throughout the year, providing guidance and advice to clients. The Wealth Manager meets with prospective clients procured by business development to gather data, generate proposals, and close new accounts. The Wealth Manager is expected to be able to present the value offering of the firm and close business, but is not responsible for finding new business.

Why Willis Johnson & Associates?

Willis Johnson & Associates is a fast growing, award winning, wealth management firm specializing in corporate executives and professionals. We help our clients optimize everything in their personal financial lives from compensation and benefit strategy to tax mitigation, from retirement planning to investments. We also have an in-house CPA to provide tax preparation for our clients that need it. And with everything we recommend, we put our clients first—all the time, every time. No product sales. No commissions. Straight fee-only financial planning and asset management.

The same way we take care of our clients, we invest in our team. Aside from providing a very competitive benefits package including medical, dental, vision, disability/life insurance, 401(k), and PTO, we pride ourselves in supporting personal and professional growth. We encourage and incentivize continued education for all employees and support their participation in educational conferences and events. WJA is also proud to be one of the Best Places to Work for Financial Advisors by Investment News.

Essential Responsibilities

- Leads the management of client cases, taking full ownership and responsibility for all client contact, including preparation of meeting agendas, client correspondence, and quarterbacking all tasks to completion
- Lead client meetings, present plans and reviews, take detailed notes, debrief and assign appropriate actions to staff
- Lead prospective client meetings set by business development, gather data, deepen relationships, present firm’s value offering and close new business
- Prepare comprehensive financial plans, reviews, reports and client presentations
- Oversee the preparation of materials from other team members in advance of client meetings
- Input data, analyze, and present output from financial planning software
- Understand the emotional aspects of finances and counsels clients appropriately
- Implement financial plans and investment strategies
- Respond directly to client requests
- Attend weekly Wealth Management meetings and bi-quarterly Department meetings

Qualifications

- Bachelor’s degree in Finance, Business, Accounting or Financial Planning required
- Master’s or Graduate degree preferred (Masters in Finance, JD, MBA)
- Five or more years working experience in similar industry
- Holds either CFP, CFA, or CPA designation
- Currently possess or pursuing the Series 65 securities license
- Strong technical and interpersonal skills
- Confident, poised and professional in appearance
- Ability to take on creative challenges and manage workload on tight deadlines
- Ability to collaborate and contribute to a team environment

To Apply - Because we are looking for an exceptional candidate to be the next member of our team, our entire advisory staff participates in the selection process. To apply, please email both your resume and cover letter to jobs@wjohnsonassociates.com with your full name, followed by “Wealth Manager” in the subject line.