

United States Jobs Expertini®

Senior Wealth Advisor, Essex, CT

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Company: Savvy Wealth

Location: Essex

Category: business-and-financial-operations

The Opportunity

Savvy Wealth is a technology-driven RIA shaping the future of wealth management. We hire top advisors with existing books of business and supercharge their growth with our proprietary software that streamlines CRM, operations, compliance, client service, marketing, and lead generation, allowing advisors to scale efficiently while delivering a superior client experience. As a Senior Wealth Advisor, you'll play a critical role in our mission to transform the industry. You'll operate in a dynamic, collaborative environment, partnering closely with our product and engineering teams to rapidly innovate and deliver a best-in-class wealth platform. This is a unique opportunity to have a voice in building the product you use every day.

What You'll Do

Transition your book of business (minimum \$15M AUM) to Savvy with our dedicated Client Transition Team

Develop new HNW client relationships through Savvy's marketing and lead generation programs

Provide comprehensive financial planning and investment management advice to clients

Collaborate with our product team in weekly workshops to provide feedback and shape the product roadmap

Partner with our user research and design teams to optimize the client experience and

platform UI/UX

Who You Are

10+ years of experience as a financial advisor

Manage a portable book of business with \$15M+ in AUM

Certified Investment Adviser Representative (Series 65 or 66)

Passionate about using technology to deliver better financial outcomes

Thrive in a fast-paced, entrepreneurial environment

Why Savvy

Competitive total comp: \$100,000 - \$499,000 K salary + revenue participation + equity

Dedicated NYC office in Union Square for client meetings

Unlimited PTO, 401(k), and top health insurance plans

Opportunity to drive innovation at a disruptive, VC-backed fintech startup

Commitment to diversity - we're actively recruiting more women to our advisor force

Savvy is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees. Join us in building the future of wealth management

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