

Senior Wealth Management Specialist

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Company: Carnegie Investment Counsel

Location: Indianapolis

Category: other-general

Sr. Wealth Management Specialist

Job Description

██████████, seeking qualified candidates to join Carnegie Investment Counsel (CIC) as a Senior Wealth Management Specialist in our Indianapolis office. The Senior Wealth Management Specialist will join a highly talented team of investment, wealth management, and advisory professionals who service the needs of high/ultra-high net worth individuals, families and institutions. The successful candidate will have a demonstrated track record of excellence in the Registered Investment Advisory (RIA) or Financial Planning industry.

Responsibilities

██████████ ons include, but are not limited to the following:

- Work closely with Carnegie's Strategic Planning Committee to enhance Tax Planning, Financial Planning and Wealth Management service offerings and related technology solutions.
- Assist Relationship Managers in client-facing communication.
- Complete detailed tax, estate and insurance document reviews.
- Drive cohesiveness between client trusted professionals, i.e. CPAs and Estate Attorneys.
- Be present at company events and engage in client activities/events to increase product knowledge and strengthen client relationships.
- Follow company and compliance policies and procedures.
- Perform other work related duties as assigned.

Qualifications/Skills

██████████ ee (Finance, Accounting, Business or Economics preferred).

- 10+ years of relevant experience working with high/ultra-high net worth individuals a plus: preferably with an RIA, investment management firm, or Financial Planning firm.
- Accustomed to a lead role in managerial or operational functions.
- Extensive knowledge and analytical skills in wealth management services such as cash flow planning, taxation, charitable gifting, philanthropy, estate planning, insurance and wealth transfer solutions.
- Proficiency in utilizing Financial Planning Software such as eMoney
- Proficiency in Microsoft Office applications (Word, Excel, PowerPoint, Office 365 etc.)
- Excellent interpersonal, verbal and written communication

Education

██████████ degree (Required)

- Current holder of CFP® designation (Required)
- Current holder of the CPA, CPWA or other related advanced professional designations (Preferred)

About Carnegie

██████████ Investment Counsel is an SEC Registered Investment Adviser with headquarters in Cleveland, OH and affiliate offices nationwide. Carnegie is a fiduciary providing clear and objective investment advice, solely advocating for our diverse group of clients including institutions (i.e., endowments, foundations), high-net-worth individuals and families. For more information, please visit www.carnegieinvest.com

Carnegie provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

Job Type & Benefits

██████████ office

- Compensation commensurate with experience
- 401(k)
- 401(k) Matching
- Medical, Dental & Vision insurance
- Life, LTD & AD&D
- Health Savings Account

- Paid time off

Ideal candidate will possess many of the following qualities

- Problem Solver
- Enthusiastic
- Collaborative and Team Oriented
- Excellent verbal and written communicator
- Strong ability to lead and manage teams
- Interest in working closely with other professionals such as Estate Attorneys and CPAs
- Excellent organizational skills
- Flexible
- Detail-Oriented
- Adaptive of new technology and processes
- Ambitious to create a more satisfying Wealth Management experience

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