

Financial Planner
Location: Mid-Atlantic Region

Introduction to Zenith

Zenith Wealth Partners (Zenith) is a fee-only investment management and financial planning firm on a mission to combat racial, age based, and gender wealth inequality by delivering comprehensive, high quality, and accessible advice to individuals and organizations. We believe that wealth management does not begin only when a client has accumulated significant wealth. Managing and achieving wealth is an infinite journey. Zenith works together with its clients to evaluate the best financial decisions while giving them back time and peace of mind.

Position Summary

With a seamless client experience and service platform now established, Zenith is seeking an experienced, driven, and mission-oriented Financial Planner to join our rapidly growing team. The role is remote-first with periodic travel to Zenith's central office in Philadelphia. Supported by the Managing Director, Head of Financial Planning, and a dedicated Client Success Associate, the Financial Planner will be responsible to:

- Recruit new clients and build a portfolio of financial planning clients in your region; help service inbound leads as needed.
- Prepare for and independently lead client meetings; engage your Client Success Associate as needed for pre-meeting or post-meeting support.
- Research financial planning topics and complex financial situations. Provide summaries and recommendations for integration in financial plans and client communications.
- Create financial plans and monitor client success, including but not limited to, cash flow modeling, debt assessments, insurance needs, investment recommendations, retirement planning, estate planning, tax planning, etc.
- Manage client workflows using Zenith's custom suite of service management tools. Proficiency in EMoney, MoneyGuidePro, or Right Capital is required.
- Assist in the firm's marketing efforts, including personal and firm-wide content generation.

Additionally, this role will not be required to keep traditional working hours and will prioritize flexibility to meet client schedules. Zenith's clients typically like to meet in the morning before work or in the evenings.

Desired Knowledge & Skills

- 4+ years of related industry experience
- Bachelors' degree from an accredited institution
- CFP® Designation or ChFC® on track to obtain their CFP.
- Client-Centric – You love building authentic relationships
- Innovative – You are tired of the status quo and are ready to shape a new future
- Self-Starter – You thrive in a results-based culture where you manage your own work
- Detail-Oriented – You sweat the small stuff and take pride in your work
- Resilient – You take speed bumps in stride and keep your eye on the prize
- Agile – You seamlessly navigate between text, video conferencing, emails, and Slack
- Flexible - You prioritize client availability and are willing to work outside of traditional hours

Compensation & Perks

Zenith embraces a high-performance culture and seeks to reward employees that deliver exemplary results. The position will earn a competitive base salary of \$80,000 with the potential to earn quarterly performance incentives for a total salary up to \$120,000.

To deliver your best performance, we believe it is critical that you invest in self-care. Company benefits include (20) days paid time off, one day off to celebrate your birthday, and an additional (10) holidays observed by the NYSE. Additionally, employees will have access to health benefits (e.g. medical and dental insurance).

Additionally, Zenith prides itself on being a supportive workplace dedicated to employees' personal and professional growth. Zenith will reimburse employees for your certification renewal and up to \$1,000 for employees to engage in continuing education. Zenith will provide you with a company-owned laptop (Apple or Lenovo) for your work.

Zenith provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics. In addition to federal law requirements, Zenith complies with applicable state and local laws governing nondiscrimination in employment in every location in which the company has facilities. This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation and training.

Pre-employment background checks will be conducted for candidates offered employment.

Next Steps

We would love to hear from you and will be collecting candidate materials on a rolling basis. Please use the Apply Now button on the Careers page of our website to submit your cover letter, resume, and preferred contact information.