Senior Wealth Consultant, CPA

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Opportunity Overview

Do you have a proven background in tax complemented with knowledge of financial planning, legacy and estate planning? Do you have a desire to work in an environment where you can apply your knowledge and interact with our Higher Net Worth (HNW) clients? Do you desire to partner with financial advisors to develop relationships with HNW clients who have complex needs? Do people consider you a strong collaborator who drives for results? Are you motivated to work with a firm with client centricity and talent development at its core?

If you answered yes to these questions, the Senior Wealth Consultant, Client Consultation Group role could be the right opportunity for you!

Department:

The Client Consultation Group as part of the Client Strategies Group provides tailored financial strategies to our higher net worth clients by partnering with our branch teams to review and analyze complex client needs and goals. The Senior Wealth Consultant position will work as part of a high performing team:

- Provide advanced subject matter expert in area(s) of tax/accounting along with broad knowledge in estate and advanced financial planning
- Share subject matter expertise with associates, the firm, financial advisors and clients
- Conducts meetings with advisors and clients to provide considerations of potential solutions to their specific area of subject matter expertise tailored to the client's unique needs

- Answer financial advisor queries on various financial topics, particularly tax
- Work in collaboration with other home office experts on providing comprehensive solutions to affluent clients
- Conduct research on financial concepts topics relevant to case work
- Perform as a subject matter expert in the development and delivery of training to departments, divisions and FAs through seminars (live and web-based), conferences and field-based meetings

- Responsible for knowledge about and interpretation of rules for potential/upcoming changes in relevant area(s) of individuals specific subject matter expertise
- Provide support and insight to the development of the team's strategic vision and annual business plan
- May provide feedback, coaching, training and guidance to Edward Jones associates and shares knowledge to help develop other associates

Position Requirements

- CPA required, CFP would be an asset, securities licenses must be obtained within 6 months
- Have a minimum of 8 years of relevant experience.
- Must be able to create and deliver professional presentations to senior audiences internally and externally, and be able to provide understandable answers to complex questions
- Must have outstanding written and verbal communication skills.
- Ability to write about complex financial topics that provide educational information to clients and FAs.
- Possess strong personal initiative and interpersonal skills.

Company Description

At Edward Jones, we help clients achieve their serious, long-term financial goals by understanding their needs and implementing tailored solutions. To ensure a personal client experience, we have located our 14,000+ branch offices where our more than 7 million clients live and work.

A typical branch office has one financial advisor who meets with clients face-to-face and one branch office administrator who enhances the team's ability to build deep relationships with clients. Headquarters associates in St. Louis and Tempe provide support and expertise to help U.S. and Canada branch teams deliver an ideal client experience. Edward Jones currently has more branch offices than any other financial services firm, and we continue to grow to meet the needs of long-term individual investors.

Awards and Accolades

- For the 19th year, Edward Jones was named one of the “100 Best Companies to Work For®” by FORTUNE magazine in its annual listing. The firm ranked No. 5 overall. These 19 FORTUNE rankings include top 10 finishes for 15 years, top 5 rankings for eight years and consecutive No. 1 rankings in 2002 and 2003.

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