



Wealth Planner

Novare Capital Management is a privately owned investment management firm that uses a comprehensive approach to serving our clients by providing investment management, financial planning, estate plan review and family financial education services. Our team has extensive experience and industry knowledge as well as several prestigious designations including CFP®, CFA®, MBA, JD, and ChFC®.

Position: The wealth planner serves as a trusted advisor and face of Novare Capital, responsible for ongoing relationship management for high-net-worth families and foundations. The planner is partnered with relationship managers to formulate and deliver exceptional comprehensive expert advice and solutions. This position provides the opportunity to participate in a leading fast-growing boutique RIA.

Qualifications

- Bachelor's degree
- CFP with 8-10 years of relevant experience in a financial service planning role
- Working knowledge of Microsoft Office suite, CRM systems and e Money or other planning software tool
- Tax planning experience, CPA firm experience welcome
- Relationship management skills and prior experience serving affluent clients a plus
- Demonstrated ability to deliver thoughtful and appropriate advice
- Exceptional interpersonal skills, and excellence in both written and verbal communication
- Collaborator who desires to work in an entrepreneurial environment

Compensation and Benefits

- Competitive salary with a performance-based bonus program
- Health Savings Account and company subsidized health insurance plan
- 401(K) Plan with matching
- Profit Sharing Plan