SHADES CREEK
WEALTH ADVISORS

Shades Creek Wealth Advisors, Inc., an independent wealth advisory firm headquartered in Birmingham, Alabama is seeking a Client Development Director who will be responsible for generating new client relationships that meet Shades Creek's ideal client profile: high net worth families, owners of private businesses, and accredited investors. A candidate for this role must have a history of successful new business development and client relationship building skills. Having an entrepreneurial mindset to execute efficiently and take an innovative approach to solve client problems is a key driver of success. Being aligned with our firm's Vision, Mission, and Core Values is paramount to joining the team.

VISION: To protect and build wealth and manage capital distribution.
MISSION: Organize, develop, and service financial strategies that protect and build wealth for business owners, families, and investors so they can focus on living purposeful lives.
CORE VALUES: Absolute Integrity, Best Idea Wins, Authenticity, Driven to Excellence, Put Client Interests First

Scope of Responsibilities

- Follow a process-driven approach to develop new relationships and generate new client activity while meeting firm expectations
- Client referral activities
- Broaden relationships within current niche markets
- Service and maintain existing client relationships

Specific Duties & Essential Skills

- Schedule a minimum number of prospective client meetings per month with individuals who fit SCWA's client profile
- Create and maintain a list of prospective clients who fit SCWA's client profile
- Track and provide a weekly report of prospects contacted, meetings scheduled, meetings held, and referrals obtained from existing contacts and centers of influence (COIs)
- Identify and attend events focused on industries that are within SCWA's niche markets
- Introduce current clients to other service offerings provided by SCWA
- Take initiative for continuing education

Education and Experience

- Bachelor's Degree; **Required**
- Demonstrated success in business development, sales, or wealth management; **Required**
- CFA, CFP, other designations, FINRA Registrations, or the ability to obtain them; **Preferred**
- Existing book of business; **Preferred**
- Experience with Client Relationship Management software; **Preferred**

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Compensation and Benefits

- Compensation will be uncapped, driven primarily by activity generated based on a transparent formula. Optional base salary and discretionary bonuses are also available.
- Company provided health, dental, and vision insurance
- 401(k) with company match

Please contact us for a confidential discussion to learn more about our team and consideration as a candidate for this exciting opportunity. Email resumes to Team@ShadesCreekWealthAdvisors.com.

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