SAGEVEST
Wealth
Management

Senior Wealth Advisor
SageVest Wealth Management
McLean, VA

Fee-only RIA seeks a Senior Wealth Advisor in McLean, Virginia to service new and existing client relationships.

About Us

SageVest Wealth Management is an independent, boutique wealth management firm advising high net worth clientele. As a true wealth management firm, we manage investments and are actively engaged in comprehensive financial planning. We place a strong emphasis on delivering excellent client service and proactive planning advice.

SageVest and its team members have been repeatedly recognized for the caliber of wealth management services delivered. This is an excellent opportunity for someone who wants to be proud of the work they do and the advice they deliver.

Teamwork is integral to our firm culture and service model. We work together, creating a collaborative and supportive environment for each other and our clients. We're focused on growth for the business and our team members (personally and professionally), while always keeping growth manageable to ensure we retain our client service standards.

Position Summary

The Senior Wealth Advisor will service existing and new client relationships, with the ability to assume the lead advisor role. The Advisor will identify, evaluate, communicate and implement strategic financial decisions with the client and team members. Client responsibilities will span investments and all areas of financial planning.

In addition to working client specific responsibilities, the Advisor will play an integral role in company initiatives as a key member of the strategic planning team. Company responsibilities will extend to strategic planning, service enhancements, technology advancements, marketing initiatives, etc.

Highlights

- Strong client-advisor relationships with low client-to-advisor ratios to support client needs and ethical standards that focus on the client's best interests.
- Ability to make an impact on the direction and growth of a recognized, independent RIA.
- Impeccable ethics under the fiduciary standard with a commitment to excellence.
- Fee-only, non-commissioned role. No portable book of business necessary.
- Collegial culture that respects and emphasizes work/life balance, including flexibility to achieve such balance.
- Ability to work remotely during Covid, and partial remote work beyond.
- Competitive compensation structure including a significant base salary along with profit and performance-based bonus awards.

- A robust benefits package including health, dental and vision coverage, paid vacation and sick leave, 401(k) plan with a profit sharing component, long-term and short-term disability insurance, life insurance, education advancement budget, professional dues allowance.
- Partnership potential.

Requirements

- 10+ years of experience as a financial advisor, with at least 3+ years of experience as a senior or lead advisor at a Registered Investment Advisory firm.
- Certified Financial Planner (CFP) designation.
- Investment management experience.
- In-depth tax knowledge including the ability to identify advanced tax strategy opportunities, and strong experience with tax matters pertaining to self-employed individuals, business owners and business partners.
- Strong estate planning background with experience working with taxable estates, complex trusts, and advanced planning strategies.
- Proficiency in utilizing various technology platforms spanning financial planning, portfolio management, client relationship management, etc.
- Team player focused on helping the clients, our company and your peers.
- Highly motivated, adaptable and intellectually stimulated.
- Clean regulatory record.

All resumes and cover letters should be submitted to careers@sagevestwealth.com. We also welcome you to learn more about our company by visiting sagevestwealth.com.