We're Hiring!
Experienced Financial Advisors – *Remote Only!*

HIRING FIRM: A Boutique RIA in the Midwest

Firm Identifier: RIA-S-HNW-MW-O1

Value Proposition: We are a boutique Registered Investment Advisor (RIA) purposely built for advisors who **wish to have a $1 million+ advisory practice** and **take off 100 days per year**. Our business model is fee-only, and we provide virtual family office services to successful, busy professionals and their families. Working 100% remotely, you don't have to trade financial success to live the life you want.

Key Benefits:

- **Full equity ownership** of your business with no restrictive covenants on your clients
- Compensation is 50% <$500k and 75% >$500k of annual revenue
- **No administrative burden.** Full support for your practice that includes support staff, back office, marketing, compliance, licensing, and registration, plus a dedicated transition team
- **No prospecting!!** Our firm utilizes a robust content marketing strategy that will put 4-6 qualified appointments on your calendar each month
- **State-of-the-art technology** platforms, including RightCapital, Wealthbox, Holistiplan, Black Diamond, Nitrogen, and more
- Exceptional client value proposition, including **integrated tax and personal legal services** for your clients
- Multi-custodial platform - **Schwab & Fidelity**
- Ability to work remotely from virtually anywhere
- **Commitment to your Success** - Mentoring and coaching to get to the $1 Million producer level

Advisor Qualifications:

- You are an experienced advisor with **greater than $300K in T12 or $30 million in portable advisory AUM**
- Have an ***active*** FINRA Series 65 or 66 license
- Certified Financial Planner (CFP®) designation (preferred)
- Desire to work in a fee-only advisory environment (residual brokerage can be accommodated)
- Enjoy working in a collaborative, collegial environment
- Demonstrate the highest ethical and professional behavior, adhering to industry regulations and compliance standards.

Company Benefits:

- 100% company-paid health, dental and vision insurance
- 100% company-paid ST/LT disability
- 401(k) with 4% match and immediate vesting
- Unlimited PTO
- Enjoy an "Ultra" lifestyle practice with complete flexibility, no sales targets, and the freedom to enjoy your life
- W-2 and 1099 options/affiliations available

Contact: Maria at Club Level Consulting, maria@clublevelconsulting.com to confidentially discuss your goals.