



## Wealth Manager

**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<sup>®</sup>, CFA<sup>®</sup>, MBA, JD, and ChFC<sup>®</sup>.

**Position:** The Wealth Manager serves as a trusted advisor and face of Novare Capital, responsible for new business development and ongoing relationship management for high-net-worth families and foundations. The trusted advisor will leverage the team and our unique value proposition 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 and 3-5 years' relevant experience in a financial services client management role, CFP<sup>®</sup> or CFP<sup>®</sup> candidate preferred
- Experience serving affluent clients
- Excellent relationship management, networking and business development skills
- Demonstrated experience in understanding a client's financial situations and personal circumstances
- Demonstrated ability to deliver thoughtful and appropriate advice
- Exceptional interpersonal skills, and excellence in both written and verbal communication
- Team player who desires to work in an entrepreneurial environment
- Working knowledge of Microsoft Office suite, CRM, and proprietary systems
- Compliance record free of disclosures
- \$30 million transferable book of business consistent with our account minimum



**Compensation and Benefits**

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

**Please submit resume and cover letter to:**

Novare Capital Management  
Attn. Don E. Olmstead  
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*www.novarecapital.com*

Novare Capital Management is an Equal Opportunity Employer.