COBBLESTONE
CAPITAL ADVISORS

Wealth Planner

Cobblestone Capital Advisors, LLC is a privately owned, Rochester-based, SEC registered, investment advisor offering comprehensive investment advisory and wealth management services. The firm manages over $2.3 billion in assets and has experienced steady growth since its founding in 1986. We are seeking an experienced Wealth Planner to join our expanding team. This is an exceptional opportunity for an intelligent, responsible person with a high degree of initiative, strong communication skills, and a desire to continue to learn to make substantial contributions to our firm and clientele.

Position Overview

This is a professional position and requires that the candidate have the ability to work comfortably with firm clients, addressing their financial needs in an appropriate manner. Key responsibilities include establishing and maintaining client relationships and providing expert advice to assigned clients. You will also be responsible for supporting Wealth Planning Group team members in managing client relationships where appropriate. You will be responsible for assisting with various firm-wide projects. Wealth Planning Group team members will be available to provide mentoring, direction, and support, but you will be expected to be able to work independently and utilize critical thinking skills.

Duties and Responsibilities

- Direct responsibility for managing and meeting client wealth planning needs
- Prepare and review financial planning reports with clients (retirement projections, estate planning, education funding, etc.)
- Collect, organize, aggregate and continuously monitor client information with accuracy
- Support Wealth Planning Group team members as needed in addressing client and departmental needs
- Assist other members of the firm with both firm- and client-related projects
- Interact with clients in a professional and respectful manner
- Master the efficient use of various software programs utilized by the firm to generate both internal and external reports and presentations

Qualifications

- Position requires a self-motivated, goal-oriented, responsible, highly detailed, personable individual
- Must be able to work as part of a group and independently
- Five years or more of financial planning experience including direct client responsibility
- Bachelor's degree
- Certified Financial Planner certification or pursuit of such certification upon employment
- Strong analytical skills
- Excellent computer skills, proficient in Microsoft Office including Word and Excel

Compensation

- Pay is competitive based on industry standards. The anticipated base salary range is $60,000 to $80,000, but may be adjusted commensurate with candidate experience and qualifications.
- Performance Bonus

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Benefits

- Significant contribution towards health insurance
- 401K matching contribution of up to 4% on employee deferrals
- Sabbatical Leave
- Paid vacation, sick time and holidays
- Group-term life/AD&D insurance – company-paid
- Vision, dental, voluntary life/AD&D insurance
- Supplemental Short-term disability and Long-term disability coverage – company-paid

Interested candidates must apply here:

https://workforcenow.adp.com/mascsr/default/mdf/recruitment/recruitment.html?cid=3412d63d-3eba-4d9f-93f9-621ab0a2ca92&ccId=19000101_000001&jobId=467918&source=CC2&lang=en_US

We are an Equal Opportunity Employer and our company's policies and practices relating to recruitment, employment, career development and advancement, promotion and retirement are based solely on merit, without regard to all legally protected classes, including but not limited to: race, color, sex, age, disability, religion, citizenship or immigration status, national origin, ancestry, military status or veteran status, marital status, familial status, sexual orientation, domestic violence victim status, predisposing genetic characteristics and genetic information, and any other status protected by law.