monument
wealth management

**PRIVATE WEALTH ADVISOR**
Alexandria, VA – Full Time

**Summary**
Monument Wealth Management is seeking a Private Wealth Advisor who specializes in financial planning to join our team.

The Private Wealth Advisor is a client-facing role and will work closely with the Partners, Asset Management team, and Client Experience team at Monument to advise existing clients. This includes preparing for and participating in Annual Client Review meetings with clients, developing and updating financial plans, and providing financial planning advice on a variety of topics.

Ideal candidates are passionate about financial planning and creating an outstanding client experience. She/he is interested in joining an interdependent team and is looking to make meaningful contributions to the growth of our firm.

This position is a hybrid role—candidates must be able to work in-person at Monument's office in Alexandria, VA several days a week and can work remotely from home the other days of the week. The Private Wealth Advisor will report directly to Vice President & Partner Jessica Gibbs.

To apply, please send your resume and a letter of interest to careers@monumentwm.com. In your letter of interest, please address what specifically about this role and Monument interests you, why you think you will be a good fit with Monument's work and culture, and how you think you can contribute.

**In this role, you will:**

- Be the primary financial planning contact for select clients—you are expected to build rapport and relationships with clients, answer questions and provide advice, and anticipate client wants, needs and concerns
- Assist in developing financial plans, including putting data into eMoney, scenario creation and analysis, and producing deliverables
- Assist in Annual Client Review meetings with clients, including preparing internal and client-facing materials, and assisting with follow-up items from meetings

- Help lead email/video Annual Client Reviews with clients, including reviewing asset allocation and any necessary planning items
- Participate in introductory and discovery meetings with prospective clients as directed and conduct associated tasks
- Be familiar with Monument's investment philosophy and managed models, and how they fit into a client's specific asset allocation and objectives
- Contribute to developing content for Monument, including website, email, social media, podcast and video content as determined by the Chief Marketing Officer's strategy
- Be an active user of our technology systems, including our planning software (eMoney, Holistiplan, Vanilla) and our client information systems (Orion, Schwab, XLR8 client relationship management)
- Perform other duties as assigned

**What this role is not:**

- A sales position in disguise—you will not have specific business development targets you are expected to individually achieve, however you are expected to contribute to team efforts to attract and win new business
- A very structured experience—you need drive and initiative to get your work done with limited oversight; ideal candidates are a self-starter who can independently manage a dynamic workload with shifting priorities, while knowing when to ask for guidance
- A job where you do your own thing—Monument is an interdependent team that relies on each member being a team player and working together to deliver the best for our clients; Monument takes great pride in our collaborative culture and a successful candidate will want to contribute to it

**Qualifications**

- 3 years or more of experience in the financial industry
- CFP® designation, or significant progress made towards achieving the CFP®
- Bachelor's Degree or greater from accredited college or university
- Strong analytical and communication skills; extreme attention to detail
- Collaborative and a good team player; excellent interpersonal skills
- An "owner" mentality—take a proactive, not reactive, approach to client experience and solving problems
- Open, inquisitive mind—enjoy thinking of ways we can do things better and has a learning orientation

**Salary and Benefits**

- Base salary of $80,000-$100,000 (depending on experience), plus participation in Monument bonus plans
- Benefits including 401k with employer match, health insurance, paid holidays, unlimited vacation (to be used responsibly), hybrid work schedule, and more

monument
wealth management

- Opportunities for limited, scheduled and coordinated remote work are available
- Professional development and coaching opportunities, which seek to help team members take on leadership roles within the firm
- Monument is pretty fun—we have a casual yet professional dress policy (no suits), a great team, and we're a dog friendly office

**About Us**
Monument Wealth Management is an independent financial advisory firm helping business owners, executives and wealthy families grow their wealth with purpose. Monument is an ensemble practice, meaning every client is a client of the firm; advisors do not have their own books of business.

Monument has several dogs who routinely come to the office. If you don't like dogs, please factor this into your decision to apply.

The Monument team has great enjoyment in what we do, how we do it, and where we do it. Because we are very focused on adding the right person to our team, candidates who progress through the interview process should anticipate multiple rounds of interviews with members of the Team (video and in-person).