Practice Management Associate

Job Location(s)US-KS-Overland Park

Posted Date2 days ago(1/17/2018 10:30 AM)

Entity

MWAHC - Mariner Wealth Advisors Holding Company

# of Openings

1

Category

Wealth Management

Job Closing Date

4/2/2018

Overview

Mariner Wealth Advisors is a national wealth advisory firm. Our mission is to help clients and their families navigate their financial future, charting the course to achieve their financial goals today, tomorrow and for years to come. Simply put, we exist to be advocates. We believe everyone can benefit from professional advice and, as our clients' advocate, we help them make informed financial decisions so they can live a fulfilling life.

Responsibilities

- Collaborate with the marketing department to create and maintain original content delivered in both traditional and digital formats
- Promote the delivery of comprehensive wealth management through the use of internal resources such as, Mariner Capital, Mariner Consulting, Mariner Investments, Mariner Institutional Consulting, Mariner Insurance Resources, Mariner Retirement, and Mariner Trust Services
- Support Practice Management's' training and development activity through content creation and delivery through presentations and webinars
- Build out the service offering for various niche market strategies (i.e., corporate executives, business owners, physicians,)
- Be a go-to-resource for a broad range of questions pertaining to practice management, technology, and wealth planning issues
- Help wealth teams increase efficiency by driving adoption of new technology, advisory solutions and processes
- Support onboarding and cultural integration of new wealth advisors and supporting team members
- Be the key contact for Practice Management's participation in the Mariner Internship program

Qualifications

- Minimum 3-5 years industry experience
- Intellectual curiosity; Demonstrate a passion for ongoing learning
- Openness to new ideas and new ways of doing things
- Excellent written and verbal communication
- Detail-oriented with the ability to multi-task and meet deadlines
- Ability to change direction quickly while remaining focused and productive
- Collaborative; cultivates strong authentic relationships inside and outside the group; willingness and desire to work across organizational silos
- Strong proficiency in Microsoft Excel & PowerPoint

REQUIRED QUALIFICATION:

- CFP®

PREFERRED QUALITIFCATION:

- Subject matter expertise in Medicare, Social Security, Elder Care

We welcome your interest in being a part of the Mariner Wealth Advisors team. We offer our associates an innovative and challenging place to work with camaraderie and teamwork. We are a growth-oriented, entrepreneurial culture that respects people and values talent, experience and ambition.

EOE/M/F/D/V