

Rinehart Wealth Management

521 East Morehead Street, Suite 580, Charlotte, NC 28202

www.rinehartwealthmanagement.com

Firm Background

- 26 year old Fee-Only investment advisory and financial planning firm based in Charlotte, NC. No products are sold in a Fee-Only firm, please reference NAPFA.com for more information and details.
- Firm wide focus on objective investment advice and planning with the client's best interests in mind.
- Serving individuals and families with average investable assets of \$1MM.
- Emphasis placed on disciplines of investment management, retirement planning, estate planning, tax planning and financial advising.
- Team based approach to managing clients with a focus on building personal relationships with each client.

Seeking Full Time Financial Advisor

- Skills and Specifications:
 - Individual who is currently a Certified Financial Planner Certificant (CFP ®).
 - Preferably 3 to 5 years of experience.
 - Excellent communication skills with clients and co-workers and an enthusiasm for working in a team environment.
- Responsibilities will include:
 - Always upholding a fiduciary duty to the client.
 - Managing 90-100 clients; coordinating investment management, account administration and financial planning activities.
 - Working in conjunction with a team of associates to meet all client needs.
 - Counseling the client with the best possible advice depending on his short or long term financial goals.
 - Assuring that the client's willingness towards a specific investment decision or financial objective is complimented by a clear understanding of all risks involved.
 - Helping the client balance the growth of assets and investments with the need for liquid cash.
 - Comply with all industry regulations and rules.
- Competitive salary plus bonus based on firm profitability (not related in any way to sale of investments or sale of other financial related products).
- Competitive retirement savings plan and health benefits.

Interested individuals should email their resume to rinehart@rinehartwealthmanagement.com.