Associate Wealth Strategist Job Description

At CI Private Wealth, we focus on exceeding client expectations every day. That starts with attracting and retaining top talent.

We are currently searching for a highly motivated, detail oriented, and experienced Financial Planner to join our Chicago Wealth Strategy Group as an Associate Wealth Strategist.

What you would do as an Associate Wealth Strategist:

- Drive the financial planning process, which includes designing, analyzing, and presenting customized plans tailored to each client's unique circumstances.
- Analyze planning opportunities to discuss with clients and clients' advisors. Areas of emphasis include:
    - Financial Independence and Cash Flow analysis
    - Estate and Wealth Transfer planning
    - Education planning
    - Tax planning
    - Insurance needs analysis
    - College savings
    - Social Security planning and optimization
    - Executive compensation planning
- Deliver planning advice to clients in a clear and understandable manner. Responsibilities will include meeting preparation, complex financial plan construction, meeting follow-up and ongoing client service.
- Mentor and coach less experienced financial planners.

For you to succeed, you should:

- Be passionate about serving clients and financial planning strategies
- Possess:
    - 4+ years of wealth management industry experience
    - Certified Financial Planner (CFP), CPA, or JD designation required
    - Bachelor's degree
- Proficient in Microsoft Office suite (Word, Excel, PowerPoint).
- Proficiency with financial planning, Social Security analysis, and tax projection software; MoneyGuidePro and Holistiplan Tax Software expertise is a plus.
- Professional, personable, tactful, efficient, and self-motivated.
- Strong interpersonal skills and sense of teamwork valued.
- Experience presenting to clients a plus.
- Strong organizational skills, multitasking, accuracy, service-minded, and meticulous adherence to details required.
- Strong written and verbal communications skills.

About CI Private Wealth

CI Private Wealth is made up of teams of highly experienced and accredited wealth management specialists working together to provide our clients with a profoundly different wealth advisory experience. We serve more than 10,000 clients—offering deeply personal service and local expertise with the resources and support of a global leader to seamlessly serve all of their financial needs.

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Structured as a partnership, CI Private Wealth offers team members the opportunity to earn a direct ownership stake in the company. We believe this uncommon business model aligns our interests with our clients and is what enables us and our partner firms to maintain our entrepreneurial spirit.