Lead Financial Planner

Position: Lead Financial Planner
Reports To: Director of Wealth Management

Position Summary
The Lead Financial Planner serves as both a senior advisor and a growth leader for the firm. This individual is responsible for delivering sophisticated financial planning and wealth management services while driving organic growth through building external relationships.

The ideal candidate is equally comfortable leading complex client relationships and cultivating centers of influence (CPAs, attorneys, and business leaders), This role combines exceptional planning expertise with an entrepreneurial mindset focused on expanding the firm's client base and market presence.

You will live out Aspyre's core values:

Innovate and Get Better: Embrace change and seek continuous improvement.
Be Great at What We Do: Deliver excellence with integrity and care.
Create Raving Fans: Build trust through exceptional service and connection.
Making Life Count®: Help our clients and team live with purpose and fulfillment.
Team First: Support each other, collaborate openly, and succeed together.

Primary Responsibilities
Client Relationship Management (60%)

- Serve as Lead Financial Planner for complex client relationships for emerging leaders, executives, business owners, and their families.
- Develop and oversee comprehensive financial, retirement, tax, estate, risk management, human capital and investment planning strategies.
- Lead client meetings and deliver planning recommendations.
- Maintain long-term trusted advisor relationships with clients.

Business Development & Growth (25%)

- Contribute to revenue growth through client retention, cross-selling and referrals.
- Develop and execute a personal business development strategy to generate new client relationships.
- Consistently cultivate referral relationships with attorneys, CPAs, business consultants, and other centers of influence.
- Conduct discovery meetings and guide prospective clients through the firm's sales process.
- Identify opportunities to expand relationships with existing clients.

Growth & Development (15%)

- Lead strategic firm initiatives.
- Develop a professional niche or area of expertise.
- Identify areas to improve client experience.
- Identify areas for improved efficiencies.

Qualifications

Required

- CFP® designation (required)
- 8–15+ years of financial planning experience
- Demonstrated success developing new client relationships
- Strong consultative sales and relationship-building skills
- Experience serving affluent or high-net-worth clients
- Excellent presentation and communication skills

Preferred

- MBA, CPA, CFA®, or other advanced designation
- Experience leading advisors or business development teams
- Established network of referral partners
- Experience with executive compensation and business owner planning

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