Financial Advisor

Brown|Miller Wealth Management
8280 Greensboro Dr., Suite 220 | McLean, VA 22102

POSITION OVERVIEW

Brown|Miller Wealth Management, a fee-only, independent, privately-owned Registered Investment Advisory firm based in the Washington, DC area, is seeking an experienced Financial Advisor (FA) to join their rapidly growing boutique wealth management team.

At Brown|Miller Wealth Management, our mission is to be an industry-leading wealth management firm providing clients with exceptional advice and service. A values-based organization, we strive at all levels to meet our values of Excellence, Respect, Ownership, Integrity, and Teamwork. Our team works collaboratively to deliver excellence in every aspect of the client experience. We work to be recognized as a client-centric fiduciary providing objective and independent advice, service, and solutions always in the best interest of our clients.

Brown|Miller Wealth Management is committed to supporting the continued professional growth of our team members. Group meetings, individual coaching and education opportunities are designed to help team members grow towards their full potential. We welcome highly motivated candidates with a desire to deliver successfully, learn new skills, assume additional responsibilities, and advance their career.

We invite you to visit us at https://brownmillerwm.com/. If this position aligns with your experience and personal objectives, please **apply here**. We look forward to discussing the many advantages that joining our expanding team has to offer.

Financial Advisor Responsibilities:

Throughout the tenure of employment, the FA must be willing to learn and improve personally and professionally. You must display a sincere interest and desire to identify clients' needs and help improve their financial well-being. As a member of a high performing team, the FA strives for excellence, shows respect, and works collaboratively, while upholding compliance, ethics, and the firm's integrity.

- Adopt and implement Brown|Miller's advice, planning, and investment management process: *Discover. Design. Deliver.*
- Deliver proactive client advice, guidance, direction, and service.
- Engage and adopt established operational and administrative systems, processes, and procedures to deliver an efficient and consistent level of service and an exceptional client experience.
- Stand ready to back up peers as needed to ensure an exceptional client experience.
- Collaborate with the team to formulate and maintain planning and investment strategies.
- Identify planning and investment opportunities for Brown|Miller to better serve and deliver value to clients.
- Engage with and develop relationships with outside professional partners and advocates.
- Actively participate with the investment management team by sharing and leveraging experience, knowledge, and research.
- Collaborate with the client service team regarding all administrative actions and functions to ensure an exceptional level of service and experience for clients.
- Work with the Chief Compliance Officer to remain current and knowledgeable on regulatory and compliance requirements.
- Maintain and document all client interactions within firm's CRM system.
- Proactively identify and promptly rectify compliance issues.
- Ensure all personal industry licenses and professional designations are properly active and up to date.

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Required Qualifications:

- Bachelor's degree
- Certified Financial Planner® certification.
- Minimum of three (3) years of client-facing experience serving as a financial/wealth advisor or relationship manager.
- Experience with CRM, financial planning software, and portfolio accounting software.
- Clean compliance history and a track record of success in cultivating and managing client relationships.
- A passion for financial planning & growing.

Benefit offerings:

- Competitive base salary with short- and long-term incentive compensation potential
- 401(k) Plan: 4% match with additional discretionary profit sharing
- Comprehensive medical, dental, and vision insurance
- Long-term disability insurance
- Group Life Insurance Benefits
- Work from home/telework is offered as needed, on a case-by-case basis
- Paid Time Off (PTO) and paid holidays following the NYSE observed holiday schedule

More About Brown|Miller Wealth Management

The Brown|Miller Wealth Management team has been providing financial advisory services to clients for over 32 years. We specialize in working with high net-worth individuals, businesses, endowments, and foundations to help them simplify their complex financial needs. Our highly regarded wealth management team built their clientele during their time working for A.G. Edwards and Sons, Wachovia Securities, and Wells Fargo Advisors before launching our independently owned firm, Brown|Miller Wealth Management, LLC.