



## Vantage Impact:

Remote Opportunity – Join Independent RIA, Salary +  
New Asset Bonus (Retain Equity In Your Existing Practice)



A Northern California-based independent financial advisory practice is seeking a like-minded, experienced financial advisor to join their growing team. The ideal candidate has an established practice and is open to changing firms with an interest in assuming practice operations responsibilities for the practice. The firm is a Registered Investment Advisor (RIA) and offers services on a fee basis, which includes fixed planning fees and fees based upon assets under management.

### What You Can Expect

- 100% virtual and collaborative work environment
- The security of a competitive W-2 salary (with meaningful bonus opportunities based on new assets brought into the firm), but with the freedom of an independent practice operating as an RIA
- Transition bonus for assets added during your transition to the firm
- Ongoing new asset bonus opportunity for future clients
- 100% equity in your existing client base
- You will have access to:
  - Training, mentorship, and ongoing support
  - Full technology suite of services
  - Marketing resources (website, brand, social media posts, other digital marketing)
  - Investment management resources & model management
- Target compensation between \$125k - \$175k
- Opportunities to be assigned new clients from the firm



### Who We are Looking for

- An operations minded financial advisor looking to take on a variety of service responsibilities and grow their current practice within a collaborative RIA structure
- Someone who has demonstrated growth and success within their current practice and the ability to transition their existing book of business (predominantly fee based managed accounts)
- An advisor with the capacity and desire to service additional clients and assume operations responsibilities for the practice
  - Build relationships with core clients by engaging with virtually and potentially in person
  - Evaluate operational systems across the business, recommend improvements, and implement strategies to create stronger client service
  - Provide ongoing service and operations support (new account set up, portfolio rebalancing, financial planning)
- Someone who believes in utilizing financial planning in their client service model
- An advisor looking to leverage firm models primarily comprised of ETFs with fees based upon a percentage of assets under management

The ideal advisor is looking to grow their practice under a team practice structure, without sacrificing the freedom they need to create customized solutions for their clients.

[Let's Set Up a Time to Discuss](#)