



Vantage Impact: Team Opportunity - Service Portion of Existing Client Base

Remote Opportunity - Move Existing Book of Business + Grow with Assigned Clients



An independent firm out of Flagstaff, AZ, is seeking a competent, experienced financial advisor to join their growing team by moving their book of business and taking on a portion of the existing client base. The firm is associated with an independent broker-dealer and is part of the broker protocol agreement.

What You Can Expect

- 100% remote environment
- The security of W-2 employment, but with the freedom of a 1099 relationship
- Transition support - this firm can assist with your scheduling and client administrative needs to ensure a smoother transition of your practice
- You will have access to:
 - Training and ongoing support
 - Our systems (including CRM) and processes
 - Marketing resources (website, brand, social media posts, YouTube marketing and other digital marketing)
 - Resources such as client education seminars
- Management of a mix of clients:
 - 100% ownership of your current clients that you bring over
 - Additional clients assigned to you by the team, set up under a split payout rate
- Future opportunities to be assigned new clients



Who We are Looking for

- An advisor who will serve clients in the way that works best for them
- An advisor who can use online tools proficiently
- The ideal advisor is looking to grow their practice under a team practice structure, without sacrificing the freedom you need to create customized solutions for your clients.

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