

Vantage Impact:

Team Opportunity - Service Existing Client Book of Business



Queens, NY



Located in Queens, NY, an experienced advisor is seeking a **financial planning professional** to service clients of an existing book of business with approximately 50 households and 25M in assets.

Advisor is offering a revenue split of 50/50 on available book, with the estimated payout rate being 50%. Advisor is also offering a higher, separate payout rate (**Up to 80%**) on any clients the prospective advisor brings to the practice and retains in transition.



What You Can Expect

- Newly independent practice growing with ~180MM in assets
- Advisor looking to build a team and succession plan for the practice
- Your own office and support staff
- Transition support

Who We Are Looking For

- Financial planning experience
- Advisor with capacity to grow current book of business
- Ideal candidate with at least 25M in portable assets
- Industry experience to be able to plug in, learn the practice, and go

Reach out to Vantage Impact if you are interested or would like to learn more about opportunities across the country.

[Let's set up a time to discuss.](#)