HEMINGTON
WEALTH MANAGEMENT

CAREER OPPORTUNITIES

JOB TITLE

Senior Wealth Advisor

LOCATION

Northern Virginia, MD, Washington, DC

Hemington is hiring a senior Certified Financial Planner™ with 10-15+ years of experience who will play a lead role in delivering advanced financial planning services to a rapidly growing group of high net worth and ultra high net worth clients. This highly organized professional will be a key leader in virtual and in-person client meetings and oversee the preparation and systematic delivery of comprehensive financial plans. Our ideal hire is a talented technician and detail-oriented team player with outstanding relationship management skills who is committed to providing an exceptional experience for Hemington clients.

WHO WE ARE

Hemington Wealth Management is a high-end planning firm that is headquartered in Falls Church, VA with $1 billion in assets under management. Our team has seventeen highly credentialled professionals firmwide with five employees based in our satellite office in Chicago. Our mission is to change the outcomes of our clients' lives by proactively providing a broad range of wealth management services. In our capacity as Personal CFO for our client families with investable assets of at least $3 million, we create space in meetings for clients to feel guided, understood, and excited about making their "Hemington" come true. The firm has consistently been named as a "Best Places to Work" by Investment News and is one of the fastest growing RIAs in the industry.

Our approach is truly collaborative, and our values are the foundation of decision-making and actions: People First, Better Together, Integrity Always, and Commitment to Excellence.

WHO YOU ARE

- You love leading client engagements and making a difference in the lives of our HNW and UHNW clients.
- Ideally, you have technical expertise in income tax and/or estate planning (advanced degree, CWPA or other certification(s) in addition to your CFP®, a plus).
- You hold yourself to very high standards of excellence, enjoy proactively running with things and problem-solving without being told exactly what to do, and your work ethic has always served you well.
- You are a lifelong learner who is proficient with financial planning software (we use MoneyGuidePro and Holistiplan); very comfortable in Excel, PowerPoint, and a CRM (we use Salesforce + Orion).
- You look forward to client meetings and feel proud of how you can simplify complex ideas to help educate clients and clearly communicate key recommendations.
- You are motivated by the opportunity to earn significant bonuses for bringing in new business or for assisting others to do the same but also appreciate that this is not a requirement to succeed and advance here.
- You are confident in explaining the details of a portfolio that aligns with an evidence-based investment philosophy and appreciate that our strategy doesn't require storytelling or attempts to forecast market conditions.
- Your teammates are deeply important to you, you are a great manager of younger advisors with whom you collaborate in serving clients, and you are appreciative of the generous firm resources to help you succeed in your dream job.
- You enjoy mentoring and training younger advisors, freely sharing your expertise and client cases so that the entire firm can benefit from your experience.
- You enjoy that part of your job entails taking a leadership role internally, such as advisor training, advanced planning quality control or taking ownership of a particular technology tool.

KEY BENEFITS

- Competitive compensation commensurate with skills and experience
- Generous 401(k) profit-sharing
- Quarterly team and net new bonus opportunities
- Flexible and remote working policies/home office tech set up
- Professional development support & budget
- Company-paid health insurance
- Summer Jumpstart Fridays
- Paid 5-week Sabbatical every 5 years

MORE INFORMATION

For more information, please contact:

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