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# Example of Wealth Planner Job Description

Our company is growing rapidly and is looking to fill the role of wealth planner. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for wealth planner

* Maintain high standards of planning education and stay abreast of market developments and trends to suggest adjustments as required
* Preparing customized wealth plans based on information obtained directly from HNW clients and their relationship managers
* Carrying out independent research to ensure all of a client’s key issues (retirement, tax, estate planning) are addressed and keeping abreast of relevant wealth planning (retirement, tax, estate planning) developments
* Proactively spotting, anchoring, introducing and following up on opportunities for complimentary businesses and solutions
* Proactively promoting PWM Partners and Services
* Ensuring appropriate service levels are provided to maximize role profitability, minimize costs and manage business to avoid financial losses and reputational damage to TDBFG
* Carry out other tasks and duties as assigned by manager from time to time
* Support the overall events team including event calendar management
* Work closely with team to manage on-site event logistics with focus on professionalism and resourcefulness
* Strong attention to detail with an emphasis on prioritization, list keeping, compliance and operational efficiencies

## Qualifications for wealth planner

* 7+ years of experience with trust, estate and business succession planning
* 10+ years of experience working in a brokerage firm, trust company, law firm, financial planning practice or bank trust department
* A minimum 10+ years of wealth planning experience gained through client contact or in a technical advisory role to advisors, coupled with investment industry knowledge
* In-depth skills and knowledge of at least one basic financial planning software platform
* Maintains proper licenses including Series 7, Series 66 licenses
* Law background, international wealth and tax planning knowledge