

Wealth Enhancement Group

Financial Advisor / Oakland California

Are you looking for a succession opportunity?

We are seeking to partner with an experienced financial advisor who has demonstrated capability working as a lead advisor with high-net-worth clients and wants to grow their business as part of our successful team. We have an established clientele that we have grown organically over four decades. We want to assign clients to a lead advisor capable of effectively working with our clients and delivering the high level of service they have been receiving. We have built our roster of clients through referrals from current clients and personal introductions from other professionals.

Our founder/lead advisor in the Oakland location will be retiring within a couple of years so we are seeking a smooth transition of these long-term clients. A qualified candidate will be able to collaborate as successor to many of these client relationships and continue to grow their own book of business and revenue.

Our ideal candidate would have an entrepreneurial mindset, a moveable book of business that they want to continue to grow by partnering with our successful firm and leveraging the resources the firm can provide. Wealth Enhancement Group has a national referral program that will assist the development of opportunities for new client relationships.

Our team has two main offices, administrative support and other successful senior and associate financial advisors. We are fiduciaries in our service to clients. Our culture is based on integrity, competence, and compassion; always doing the right thing.

This is a full-time, in-person position in our Oakland, California Office.

Please contact us to discover if you are a good match for this opportunity.
Eaanes@wealthenhancement.com; L.Ginsburg@wealthenhancement.com.

About Wealth Enhancement Group www.wealthenhancement.com

Wealth Enhancement Group is a Greater Minneapolis-based independent wealth management firm offering comprehensive and customized financial planning and investment management services. Founded in 1997, Wealth Enhancement Group serves clients nationwide and continues to expand into new regions each year. Wealth Enhancement Group specializes in providing retail clients with the team-based expertise and resources they need to simplify their financial life.