SAGE
PRIVATE WEALTH GROUP

Position Name: **Wealth Advisor**
To be Filled: March/April 2019
Office Location: Oakbrook Terrace, IL

SAGE PRIVATE WEALTH GROUP (SAGE) is looking for talented individuals with high energy and ambition, natural leadership traits, an ownership mentality and a genuine interest in serving clients. Join our team of Wealth Advisors and be part of a culture guided by the ethos "doing well while doing good." We further this sentiment not just by managing and preserving our clients' wealth but by donating a dime of every dollar of our profit to our own foundation, the SAGE Private Wealth Group Foundation. SAGE PWG Foundation is focused on improving the lives and living conditions of people in the communities served by SAGE Private Wealth Group (first), then ultimately in any location where we can make a difference to those in need. Find out more about us on our website at www.SAGEprivatewealth.com.

Position Summary

Wealth Advisors (WA) at SAGE are responsible for deepening client relationships and elevating the client experience to facilitate outstanding retention. The aim of the WA is to develop a tailored client experience comprised of personalized investment solutions and services in partnership with a Senior Wealth Advisor. As a WA, you will work independently within a team structure while also collaborating with others across the organization. Acting as Fiduciaries for our advisory clients, we are proud of our client-centered approach in providing exceptional service that our clients have grown to expect and, more importantly, deserve. We strive to deliver **service excellence** through the SAGE Wealth Management Standard of Care as we work to grow and protect our clients' investment legacy.

Key Accountabilities

- Analyzing, drafting and implementing comprehensive financial and investment plans to help meet client objectives
- Collaborating with the SAGE Chief Operations Officer & Compliance Officer to produce and deliver exceptional Financial Life Planning services
- Working with our SAGE Investment Committee to master SAGE's macro view, investment approach, allocation parameters and manager selection criteria in order to deliver exceptional portfolio solutions to clients
- Remaining current with new investment products and strategies and economic and market trends
- Effectively demonstrate the Core Values of SAGE in all facets of day-to-day responsibilities
- Adhering to all compliance/risk procedures, following corporate and industry protocols, and acting as a fiduciary and in a manner, which protects the interests of the clients and SAGE at all times
- Participating in training and development to continually improve your ability to provide the best advice and service for clients
- Delivering exceptional client service in order to maintain high asset retention rates

Key Competencies

- Planning and time management
- Problem solving
- Integrity and Trust
- Adaptability and flexibility
- Diversity and inclusion

Essential Education

- Bachelor's degree required
- Valid Series 7 securities registration
- Valid Series 66 or equivalent securities registration
- Life, Health and Variable Annuity license or ability to obtain license within 6 months of employment

Essential Experience and Job Requirements

As a Wealth Advisor with SAGE, you must possess superb verbal communication skills, an excellent work ethic, and the ability to identify and respond to client needs. Candidates must also have strong working knowledge of economic and accounting principles as well as the financial markets.

- 2 to 5 years of experience as a Service Advisor, Financial Advisor or Wealth Advisor
- Superior client service skills with proven results
- Strong leadership traits
- Clean CRD/U4 record
- Working knowledge of technology and software planning tools to analyze and report financial data
- Intermediate level proficiency with Microsoft Office Suite

Other requirements (e.g. Travel, Location)

The Wealth Advisor team member will be based out of our new corporate offices in beautiful Oakbrook Terrace, Illinois known for fantastic dining, shopping and an outstanding quality of life.

Total Compensation Package

SAGE is committed to providing a comprehensive and competitive Total Compensation Package including Health, Dental, Vision and Life insurance benefits, Long Term Disability insurance, free 24 hour access to health club in our corporate office, a competitive salary, a variable bonus opportunity, and a great career path to partnership. We offer a variety of additional programs and services to help meet the diverse needs of our valuable team members, some of which include unlimited time off, flexible work arrangements, 401k, Wellness Program, and Employee Assistance Program. We also offer tuition assistance, training, peer coaching and mentorship support, on-going "lunch and learn" programs tailored to our team members' needs and interests.

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Join an organization that since November 2011, has grown to become one of the largest Raymond James Financial Services offices in the state of Illinois, based on client assets (as of 12/31/18). Our team of advisors provides a fiduciary standard of care and a full Wealth Management strategy to private clients. Prioritizing our clients and their financial objectives is reflected in the depth of experience, expertise and passion our ensemble team of specialists bring to each of our valued client relationships, governed by a deep conviction in putting others first.

Please send a resume and a cover letter summarizing your experience to careers@sageprivatewealth.com. Applicants for employment who need accommodation should contact Human Resources prior to coming in for their interview: careers@sageprivatewealth.com.

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