



Director of Financial Planning

Verdence Capital Advisors, an independent RIA headquartered in Hunt Valley, Maryland with another office in Alexandria, Virginia is looking to hire a Director of Financial Planning. Since our launch in 2017, Verdence has more than doubled in AUM from \$1.4B to over \$3.0B by employing a disciplined business development strategy focused on financial planning.

Verdence is seeking a leader for our financial planning apparatus who can perform the planning functions for our private client and Verdence/Family clientele.

Responsibilities include, but are not limited to:

- Meet with clients?
- Provide strategic planning and execution to expanding the financial planning department
- Hire, train and promote financial planners through the Verdence ranks
- Assess technology and 3rd party options to determine best-in-class solutions for our clients
- Define and implement a consistent process/planning best practices that our advisors can rely upon in advising both prospects and clients on how to navigate the challenges associated with risk mitigation, time horizon, portfolio construction, asset allocation and goal setting

The ideal candidate's experience should include:

- A CFP designation
- Minimum least 10 years of industry experience.
- Leadership experience (preferred)
- Excellent written and verbal communication skills
- An appreciation of and the ability to complement to our strong team culture and collaborative environment

Verdence offers a highly-competitive compensation structure with salary + bonus + profits interests deferred comp plan, as well as considerable benefits platform for all employees including paid health benefits, vision, dental, life, disability, Rx, 401(k) and HSA plan.

Compensation package will depend on level of experience and expertise in both planning and leadership.

College undergraduate degree required.

If interested, we would like to have a conversation with you. Please contact Thomas New at tnew@verdence.com or 410-472-5392.