



Senior Wealth Manager

Reports to: CEO
Location: Bala Cynwyd, PA
Benefits: Yes
Status: Full-time, Exempt

About Us: Odyssey Capital Advisors (OCA) is a growing independent registered investment advisory firm located in Bala Cynwyd, Pennsylvania. We are an ensemble business focused on Investment Management, Business Consulting, and Financial Planning. Trust and transparency are at the heart of who we are and what we do as we help our clients reach their professional and financial goals.

About the Role: Odyssey Capital Advisors is seeking a Senior Wealth Manager. This leader will help manage the firm's largest client relationships and is among the more experienced advisors in the firm. Our Senior Wealth Manager will contribute to our growth—bringing in their existing clients, attracting new clients, cultivating their network, and eliciting referrals. They also recruit, coach, develop, and supervise other members of the account management team. Our clients trust us and refer us to their family and friends because we place honesty and integrity above all else, and always do what's best for them. Our Senior Wealth Manager enjoys forming long-lasting relationships with a wonderful group of clients. Does joining an encouraging team that works intelligently to meet clients' goals while achieving a healthy work/life balance appeal to you?

The impact you can make:

- Expertly service premier client relationships, handling complex cases, and troubleshooting problems that arise
 - Teaming up with clients' tax, legal, insurance, and other professionals to provide comprehensive and aligned financial services
 - Retaining all key client accounts and expanding the relationship to the next generation
 - Collaborating with our financial planners to develop holistic customized plans for clients
 - Growing our client base through referrals and business development initiatives and identifying new opportunities with existing clients
 - Oversees the firm's advocacy efforts for careers in the RIA industry at local universities and organizations in our community
 - Seeking new referral relationships with professionals who fit our profile for centers of influence
 - Mentoring and empowering team members to achieve top performance and to grow professionally, as well as delegating responsibilities for client meetings and other activities to junior team members
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What excites you:

- Delivering service beyond client expectations
- Advanced financial planning and wealth management acumen and strategies
- Active listening and connecting easily with people to build trusted, lasting relationships
- A fiduciary mentality: always doing what's right for the client and maintaining confidentiality in all matters



- Using advanced analytical and quantitative skills, with demonstrated sound judgment in working with clients
- Developing and mentoring managers and employees to nurture a highly effective team
- Taking initiative and generating a quick turnaround
- Staying abreast of industry and regulatory updates, the economy and financial markets, and fraud and cybersecurity threats
- A career as a Registered Investment Advisor, with the interest and aptitude to ultimately achieve a partner role at the firm

What you bring to OCA:

- High emotional intelligence and/or life experience to help clients accomplish their goals through all life stages
- An existing book of business, preferably in the range of \$5 to \$15 million
- Licenses: FINRA Series 65 (or equivalent); Life/Accident Health License
- Master's degree (preferred) or bachelor's degree in business, finance, or accounting
- CERTIFIED FINANCIAL PLANNER® designation preferred
- 5-8 years of senior-level account management, advisory, or relationship management experience

What OCA brings to you:

- Starting salary of \$100,000 depending on experience and book of business
- Benefits include health care, vision; 401(k) plan with firm match, paid time off (PTO), professional development support, and volunteer time off
- Culture of recognition where employees acknowledge and reward great work of their colleagues

To apply:

- Submit your resume to recruiting@odysseyadvice.com

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