

human investing®

6000 Meadows Rd, Suite 105

Lake Oswego, OR 97035

503-905-3100

www.humaninvesting.com

Job Title:

Lead Advisor

Full time, exempt, in-office

Company Overview:

At Human Investing, we believe financial planning is about more than numbers. It's about people. Our mission is *to faithfully serve the financial pursuits of all people* through tailored advice and authentic relationships. As an independent, employee-owned financial management company, we're focused on delivering the highest standard of care to every client and fostering a collaborative growth-minded culture for our team. We are always looking for exceptional talent to join us. Our next great teammate might be you.

Position Overview:

The Lead Advisor serves as the primary point of contact for clients and is responsible for delivering exceptional financial planning advice, managing ongoing relationships, and leading a service team that supports each client's journey. This role requires strong technical proficiency, leadership capability, and a deep desire for helping people thrive financially.

A successful Lead Advisor not only provides clear, confident planning advice but also lives out our firm's values by mentoring others, contributing to firm strategy, and growing our presence in the community.

Key Responsibilities:

Client Service & Planning

- Serve as the primary relationship manager for a dedicated group of clients.
- Prepare, review, and present comprehensive financial plans tailored to each client's unique goals.
- Lead the implementation of planning strategies with support from associate advisors and client service staff.
- Oversee all deliverables to ensure quality, accuracy, and alignment with the Human Investing experience.
- Maintain ongoing communication with clients to adjust plans and provide clarity during market or life transitions.
- Managing \$750k–\$1M+ in annual client revenue (over time)

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Key Responsibilities Cont'd:

Leadership & Team Development

- Provide mentorship and oversight to associate advisors and support team members on client work.
- Participate in or lead internal initiatives that improve firm operations, planning capabilities, and culture.
- Serve on a firm committee (Financial Planning, Investment, Sales) as applicable.
- Collaborate with peers to foster a culture of shared learning and high performance.

Business Development & Thought Leadership

- Engage with clients and Centers of Influence (COIs) to create referral opportunities and grow your client base.
- Build a defined personal presence within a niche or community that aligns with the firm's long-term strategy.
- Contribute to firm thought leadership through writing, speaking, and community engagement.
- Represent Human Investing with integrity in the broader community through volunteering, boards, or advocacy (encouraged, but not required).

Qualifications:

Minimum Requirements

- Bachelor's degree in finance, accounting, or a related field (preferred)
- 5–7+ years of experience as a financial advisor or comparable client advisory role
- CFP® designation (or a clear path to obtaining it soon)
- Series 65 license (or ability to obtain quickly)
- Clean industry compliance record
- Demonstrated expertise in estate, tax, retirement, insurance, investment, and cash flow planning

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Skills & Personal Attributes – Your give:

- High personal and professional integrity
- Clear communicator who can lead complex client conversations with empathy and confidence
- Strong organizational and leadership skills
- Ability to manage multiple projects and deadlines in a fast-paced environment
- Passion for continuous learning and improvement
- Emotionally intelligent and service-minded
- Collaborative team player who contributes to a positive, growth-oriented culture

Why Join Us – Our Give

- A values-driven culture committed to professional and personal growth
- A collaborative team environment with mentorship and peer support
- Opportunities to grow a client base within a proven planning process
- Leadership development pathways as our firm continues to grow
- Flexibility, generous benefits, and meaningful work
- Our Benefits –
 - Competitive salary using industry benchmarks
 - Fully paid medical/dental/vision with company funded H.S.A or HRA
 - Paid time off + Sick time
 - 401k 3% non-elective contribution (we contribute even if you don't!)
 - Discretionary company bonus and profit-sharing contribution
 - Perks like fully stocked kitchen, year-round team building activities

How to Apply:

Interested candidates please submit a cover letter with resume to Jill Novak at jill@humaninvesting.com

Human Investing is an equal opportunity employer. All applicants will be considered for employment without attention to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran or disability status.