BlueTrust

Financial Planning Career Path

A Flow Chart for Planning and Management Growth Opportunities

Developing Technical Financial Planning Expertise. Developing Management, Marketing, and/or Service Expertise. Developing Mentoring and Management Expertise.

Position Responsibilities

	Financial Planner	Senior Financial Planner *	Private Wealth Advisor	Senior Private Wealth Advisor	Managing Director
Client Service	95-100% planning (technical)	75-85% client service	60-85% client service	50-75% client service	40-60% client service
Business Development	Modest business development requirements	5-10% business development	15-30% business development	20-35% business development	20-30% business development
Team Management	No management requirements	No management requirements	5-10% management	10-25% management	10-40% management
Client Relationships	No requirements	Relationship responsibility for 10-25% of Sr. PWA book	Responsible for relationships with personal clients being served	Responsible for team and personal client relationships	Responsible for branch's and personal client relationships
Focus	Technical support of Private Wealth Advisor	Increasing client responsibility and technical support of PWA	Service of Sr. PWA client relationships; development of new client relationships	Development and service of personal and team client relationships	Development of branch's client relationships, staff development, and service of personal client relationships
Team Member Development	No staff development requirements	Trains and mentors FP; begins to delegate and accomplish work through CSA and FP	Hires/mentors CSA, FP, or Sr. FP	Develops PWA	Develops PWAs and Sr. PWAs

** There are two additional promotional paths from the Senior Financial Planner:*

- *Service Advisor to Senior Service Advisor: focused on serving existing clients vs. generating new business*
- *Operations Manager: focused on internal branch administrative, managerial and operational support*