TRUXTON

WEALTH • FAMILY OFFICE • BANKING

Wealth Advisor

FULL-TIME • TRUXTON WEALTH • NASHVILLE, TN

WHO WE ARE

Truxton Trust Company is a provider of private banking, wealth management, trust, capital markets, and family office services for wealthy individuals, their families and their business interests. Serving clients across the world, Truxton's vastly experienced team of professionals provides customized solutions to its clients' complex financial needs. Founded in 2004 in Nashville, Tennessee, Truxton Trust upholds its original guiding principle: do the right thing. Truxton Trust Company is a subsidiary of financial holding company, Truxton Corporation (OTCPK: TRUX).

MISSION STATEMENT

To do the right thing every day, putting our clients' interests first, with distinctive, comprehensive financial solutions that protect and promote client prosperity and quality of life.

WHAT WE OFFER

- 401k + company match
- Medical, life, dental, vision insurance
- Paid federal holidays and vacation
- Employee assistance program (EAP)
- Support towards continued learning and industry certifications

WHY YOU SHOULD WORK HERE

- Truxton is a highly profitable and growing company that has been recognized by American Banker as the 13th best community bank (top-ranking TN bank) based on 3-year ROAE
- Opportunities to grow your expertise, take on new challenges, and gain exposure to a wide range of sophisticated work
- Because we are a smaller company, you will have the opportunity to chart your own course and contribute to initiatives that go beyond your job title
- Opportunities for incentive bonuses through new business referral

CONTACT

- careers@truxtontrust.com
- 615-515-1700
- 20 Burton Hills Blvd, Suite 200
  Nashville, TN 37215

APPLY NOW

THE ROLE

The Wealth Advisor is responsible for the development, coordination, and implementation of comprehensive Wealth services for sophisticated and complex client relationships. This position acts as the principal point of contact for Wealth clients and are responsible for overall client service delivery and satisfaction. We are looking for candidates who possess a strong command of sophisticated wealth management practices and are experienced in growing new and existing client relationships. At Truxton, our Wealth Advisors are uniquely positioned to manage fewer, but deeper client relationships that extend across multiple generations.

WHAT YOU WILL BE DOING

- Acting as a trusted advisor, anticipating client needs and providing world-class service to our clients in an accurate and professional manner
- Expanding the Truxton footprint by building connections with high net worth contacts in your community through active participation in organizations, associations and events to increase your network exposure
- Helping clients to articulate long-term financial and family goals; implementing plans to position clients for optimal personal and financial outcomes
- Maintaining deep and up-to-date knowledge of Wealth clients' financial and family situation and frequent communication with Wealth clients
- Reviewing estate planning documents, preparing materials for client presentations, and analyzing complex planning issues
- Preparing presentations and facilitating ongoing client reviews in close coordination with other Wealth professionals
- Establishing and maintaining business relationships with outside centers of influence such as CPAs, attorneys, local advisory board members, civic associations, etc. to enhance Wealth business development efforts
- Serving as a thought leader and internal resource on various wealth management topics and supporting the development of the Wealth team
- Staying abreast of changing economic, legal, financial planning, investment trends, and general market and business issues

WHAT WE ARE LOOKING FOR

Attributes and Abilities

- Comprehensive, specialized experience and understanding of the wealth management industry, practices and issues
- Extensive knowledge of investment management, tax guidance, trust administration, and estate planning
- Proven track record in business development, sales, and client service
- Delivery of distinctive and thoughtful client service in a manner that secures client confidence
- Adoption of our culture of entrepreneurship and teamwork

Experience and Skills

- 5-10 years in a wealth management role; CPA or JD experience preferred
- Proficient with Microsoft Office; experience with trust accounting platforms, Black Diamond Wealth Platform, or financial services CRM platforms preferred

Education and Designations

- Bachelor's Degree in Finance, Accounting, or Economics preferred
- Advanced Degree, JD, or MBA preferred
- Professional Designation (CFP, CTFA, CFA, CPA, etc.) preferred