Monument
WEALTH MANAGEMENT

Financial Planning

Company Overview

Monument Wealth Management is an independent Registered Investment Advisory firm based in the Washington D.C. area that takes a unique, collaborative team approach in leading clients through a personalized Private Wealth Management experience.

Monument specializes in helping successful entrepreneurs, executives, other high-net-worth individuals and their families properly connect their financial resources to their personal aspirations. We do this through innovative, cash flow-based private wealth planning and discretionary in-house asset management completely unconstrained by any large corporate agenda.

Monument supports clients throughout the entire wealth creation and preservation cycle, and serves as a partner, advocate and advisor during all aspects and phases of their journey.

In addition to our Wealth Management offering, Monument also has a Family Office offering exclusively for clients with a net worth in excess of $25m

Why Monument Was Founded

The Co-founders are entrepreneurs at heart and founded Monument in May of 2008 after individual careers spanning several different industries and Wall Street firms.

They knew in their hearts that they could create something better…

Different.

They envisioned and built a firm that would challenge the industry status quo by being unique, creative, innovative and respected in an outmoded and antiquated sales-focused industry. They wanted to offer clients real value through a unique experience completely unconstrained by any large corporate agenda.

They ended up with a firm that focuses on helping their clients, rather than a company focused on quarterly earnings and shareholder value.

The Monument Pillars

We started Monument based on 6 Pillars:

1. **Our Mission -** Monument's mission is to become the industry leader at properly connecting investors' financial resources to their personal aspirations by always challenging the status quo.
2. **Our Values -** It should come as no surprise that in order to accomplish our mission, the Monument Team adheres to a set of values, including always act in the best interests of our clients, adhere to the highest professional standards, improve our clients' performance significantly, and create an unrivaled environment for exceptional people.

3. **Our Practices -** Our values are of little meaning unless they are preserved in our company's practices. This materializes through our rankings - Washington Business Journal's 2013, 2014, 2015 and 2016 "Best Places to Work!" and Entrepreneur Magazine's 2016 "Entrepreneur360" award.
4. **Our People -** We have become fanatical about recruiting new employees and interns who are not just the most talented but also the best suited to our Monument Culture.
5. **Our Story -** Monument has a unique history and a unique story and stands informally at the core of our culture.
6. **Our Place -** We take our working environment very seriously because not only is it an extension of our brand and culture but it is also an extension of what we do for our clients every day AND an extension of our team environment.

Our Vision

The Co-founders have a vision that guides the long-term strategic plan for Monument: to become an employee-owned firm that endures well beyond the legacy of the original two Co-founders and is known by our clients, our advocates, and our team as the most unique, creative, innovative and respected Private Wealth Management firm in the Washington D.C. area.

Job Description

Monument is seeking a Financial Planning Associate for our office in Alexandria, VA. This is not an administrative assistant role; this is your chance to play a key part in the future success of our fast-growing organization! Our new Financial Planning Associate will be responsible for facilitating the Monument Blueprint process with prospective clients and the creation and maintenance of the Monument Private Wealth Plans for current clients. This individual will focus on client needs in the areas of cash flow planning, retirement planning, estate planning, education planning, life insurance evaluation, and business sale planning. Finally, as a small business, everyone does a little bit of everything, so from time to time there will be responsibilities assigned outside the scope of planning.

This position will report to the Senior Financial Planner, Jessica L. Gibbs, CFP®. Jessica will be the primary trainer and mentor for this position.

Responsibilities & Activities

- **Representing Monument Wealth Management**
  - Publicly represent the firm's strategic brand and messaging.
  - Demonstrate the value of Monument's Private Wealth Planning process to potential and existing clients.
- **Private Wealth Planning**
  - Conduct Monument Blueprint meetings with prospective clients.
  - Prepare and mail the proprietary Monument Blueprint packages with an engagement letter, document request, and action items.

- Enter and verify client information in our financial planning software (eMoney) and generate plans. Assist clients in aggregating their accounts into the system.
- Prepare and conduct Private Wealth Planning meetings with clients.
- Prepare and conduct Annual Client Reviews.
- Responsible for ongoing client engagement in all phases of the Private Wealth Planning process, including comprehensive financial planning, risk management, updating client information, and recommending investment strategy changes.
- Review and modify systems to enhance the Private Wealth Planning experience.
- Develop and maintain written systems of all Private Wealth Planning activities.

- **Relationship Building**
  - Focus on client relationship management, including ongoing and regular client contact, communications, meetings, and coordinating with the Team on managing the on-boarding process for new clients.
  - Develop close, long-term relationships with planning clients to understand their current circumstances and future needs or wishes.
  - Serve as integral part of the relationship team for firm clients working with and under the supervision of the Lead Advisor.
  - Help build loyalty among clients, so that they become advocates who are enthusiastic about referring people to Monument.
- **Additional Responsibilities**
  - Maintain familiarity with industry and planning trends and apply knowledge to client service and relationships.
  - Develop and maintain knowledge of and show ability to comply with compliance standards.
  - Stay current on new technology and tools that can enhance our offering or create internal efficiencies in the Team.
  - Perform other duties as assigned.

Educational & Industry Requirements

- Bachelor's degree
- Ideally, two to three years of experience in a financial planning firm, however passion, creativity and drive is more highly-valued than experience
- Professional designation (or serious progress towards attaining designation) such as CFP® or CPA highly desirable

Knowledge, Skills, & Abilities

- Requires:
  - Extreme attention to detail
  - Strong analytical, communication and people skills – this is a client-facing role
  - Excellent interpersonal skills and strong personal presence
  - Excellent attitude and an extraordinary client service orientation

- A genuine interest in serving and caring for other people
- Excellent organizational and time management skills
- A self-starter and a burning desire to succeed
- An ability to handle multiple tasks and handle stress
- Proficiency with Microsoft Office Suite
- Proficiency with eMoney Advisor a serious plus

- Highly collegial - this person listens to and respects a wide variety of viewpoints on any given issue
- Ability to work as a member of an interdependent Team
- Attendance is an essential function
- Salary is commensurate with experience

Who Should Apply - If you are a creative, driven, friendly, easing-going professional who is a self-starter, passionate about financial planning and looking to really contribute something to a culture, firm and Team like Monument, please send your resume and letter of interest to careers@monumentwm.com.

Please spend time researching our firm by visiting our web page, videos and blog. If Monument and this position sounds interesting to you, please include in your cover letter:

- Why you are a good fit for our brand, culture, Team and position
- How you can contribute to all of the above
- Examples of anything that highlights you or your work – any and all mediums are acceptable

We will review your credentials and will respond with more detail about this opportunity. You should anticipate multiple rounds of interviewing with members of the Team (Skype and in person) along with written and verbal testing, case studies and Q&A.

Who Should Not Apply – People looking first and foremost for a very structured experience and/or a big company name on their resume should move on. If you are not a good fit for working on an interdependent Team that takes pride in the culture and the clients above all else, this opportunity is not a good fit. If you have no personality and no sense of humor or need to be told what to do every second of the day, Monument is not the place for you.

This is the place to take what you do very seriously but not one where you take yourself too seriously. Monument is a process-driven firm and Team. If you cannot deal with processes and systems or you are someone who cannot get their work done, this is a bad fit. If you want a job where you just do your own thing, this is a bad fit. Monument is an interdependent Team from the owners on down.

If you are firing off your resume, cutting and pasting a cover letter to every available opportunity without fully understanding the brand, culture and team you want to work with, please move on.

We are a small business that cannot get our hiring wrong – if you can't be patient with our decision making process, you will not make it through our interviews.

Finally – Monument has several dogs who come to the office during the week. If you don't like dogs, please factor this into your decision to apply.

For more information about our company, please visit our website
www.monumentwealthmanagement.com