FP TRANSITIONS®

Title:	EMS Essentials Business Consultant, Advisor Solutions
Classification:	Full-time exempt; permanent hire
Department:	EMS Membership Programs
Reports to:	Marcus Hagood, Director of EMS Membership Programs

Objective:
Apply your knowledge as an experienced strategic coach while leveraging our team's diverse specialties to help our Equity Management Solutions members focus on decisions that build long-term sustainable value.

Summary:
The EMS Management Consultant plays a crucial role in assessing, planning, and servicing our enrolled membership to enable independent and sustainable growth by advising members to focus on decisions and outcomes that provide sustainable value growth.

Our consulting solutions leverage professional valuation, best-in-class peer group benchmarking, and industry best practices that ultimately drive top and bottom-line performance. This role is tasked with retaining our Equity Management System clients throughout their annual membership engagement while advising them on how they can leverage other high-value services for continued sustainable growth.

Essential Functions:

1. Account Management: Oversees recruitment, onboarding, and retention of members by developing relationships and a deep understanding of our clients' business needs. Drives membership enrollment and conversion to new engagement opportunities while achieving high client satisfaction. Monitors communication between various departments to ensure that the client is getting the information and insight they need to delight the customer. Works closely with key customers to keep them updated on process changes designed to improve service.

2. Assessing & Planning: Independently leads annual valuation review, business growth goal setting, continuity, and succession strategies to optimize the equity-based business model fundamentals; helping identify and prioritize business goals that grow, protect, and transition enterprise value.

3. Business Consulting: Manages schedule to drive consulting engagements and monitor processes against business goals, equity value growth, transition opportunities, and M&A transactions. Assist clients with utilizing resources designed to assist members with inorganic strategy and execution.

4. Product Development: Participates in a structured design of education, training, consulting processes, deliverables, and touchpoints to ensure predictable and scalable client engagement and to meet or exceed revenue and profitability goals.

Competency or Skill Requirements:

- Business Knowledge: Understands wealth management organizations, systems, and practices. Understands regulatory structures for insurance and financial products and services and how they impact the operations and suitability of business structures and decisions. Understands taxation tradeoffs and optimization strategies within various business structure models. Understands the performance levers that can be optimized to increase the value of various business entity structures. Understand the competition; is aware of how strategies and tactics work in the marketplace.

- Consulting Ability: Must have competency in reviewing profit and loss statements. Understands the business and key performance indicators that drive insight to action for growth. Can learn new industry, company, product, or technical knowledge; picks up on nuance quickly. Uses rigorous logic and methods to solve difficult problems with effective solutions. Is excellent at honest analysis and can see hidden problems; looks beyond the obvious and does not stop at the first answers.

- Planning & Time Management: Accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks down work into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks; measures performance against goals; evaluates results. Uses time effectively and efficiently; concentrates efforts on the more important priorities; can attend a broader range of activities.

- Communicating Effectively: Demonstrate effective communication in a variety of formal and informal presentation settings, both inside and outside the organization, on data and controversial topics. Command attention and manage group processes during the presentation. The ability to identify and change tactics midstream when something is not working. Write with clarity and succinctness in a variety of communication settings and styles.

- Relationship Building: Relates well to all kinds of people; builds rapport to create constructive relationships; uses diplomacy and tact; can diffuse even high-tension situations comfortably. Is dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it to improve products and services; acts with customers in mind; establishes trust and respect.

Education and Experience:

- Bachelor of Business Administration (BBA), Bachelor of Science, Business Administration, Finance/Economics, or equivalent education and experience is required.
- 2+ years' experience as a business or management consultant, preferably working with financial advisors who provide insurance and wealth management services.

Time spent performing tasks:

- 500+ Advisory Businesses annually with Membership program
  - 80% of time spent as an Account Manager.
  - 20% of time spent as a Business Consultant.
- This role will partner with the following FP Transitions teams: Consulting, Analytics & Research, Valuation, Legal, Advisor Services, and Corporate Services.

Compensation and Benefits:

- Compensation package ranging from $75,000 to $125,000 DOE, including base salary, commission, and performance-based bonuses.
- Company lunches, snacks, and team-building events
- Medical, Vision, Dental, 401k with 25% employer match.
- Company holidays (including employee’s birthday) and accrued PTO.

Physical factors & working conditions:

- Professional office environment.
- On-site preferred.
- Remote/hybrid available with manager approval.
- Some travel may be required.