Blue Prairie Group, LLC

Wealth Management & Small Retirement Plans Investment Consultant
Job Description

Title: Investment Consultant

Location: Chicago Loop

Status: Full-Time

Compensation: Competitive Base Salary + Eligible for 2 Performance-Based Incentive Plans

JOB DESCRIPTION

The Investment Consultant is responsible for providing financial consulting and advisory services to Blue Prairie Group's individual wealth management and small group retirement plan clients (<$10mm). The Consultant has responsibility for all aspects of the client relationship, including acquisition, on-going relationship management, investment consulting, vendor management as well as client retention. This includes:

- **Business Development/Client Acquisition** -- Successfully utilizes appropriate marketing, warm calling, networking, speaking and writing opportunities. Also develops productive relationships with "centers of influence" such as law firms and accounting firms to identify cross-referral opportunities.
- **Planning** -- Works with clients to develop investment objectives along with short and long-term plans (for individual clients this includes advise on insurance needs and estate planning).
- **Reporting** -- Works closely with Blue Prairie Group's Investment Analytics Group to prepare prospect and client reports in the areas of benchmarking, performance monitoring as well as portfolio designs consistent with the prospect's or client's stated investment objectives.
- **Delivery** -- Delivers quarterly, semi-annual and annual investment performance reports to individual wealth management clients and retirement plan committees.
- **Relationship Management** -- Partnering with Blue Prairie Group's CRM team, maintains close contact with clients, seeks and responds to client feedback (including through periodic client surveys) and continuously looks for ways to add value and deepen relationships to ensure satisfied clients who remain with the firm.
- **Compliance** -- Ensures that work is completed in compliance with all regulatory requirements and Blue Prairie Group's internal policies and controls.

DESIRED SKILLS & EXPERIENCE

The successful candidate must be willing and able to operate in Blue Prairie Group's client-centric and team-based culture. Our organization focuses on continuous improvement and employee development while emphasizing significant responsibility and accountability to clients and to each other. In addition, the successful candidate will specifically have a:

- Bachelor's degree
- Registered Investment Advisor (RIA) and/or Series 6/7 registration
- History of 3 years' or more working with individuals with a minimum of $250,000 in investable assets and/or with small group retirement plans having at least $1,000,000 in assets
- Track record of new business development *and* client retention
- Track record of 100% regulatory compliance
- Working knowledgeable of investments, portfolio design and fiduciary responsibilities.
- Portable book of business is desirable

ABOUT BLUE PRAIRIE GROUP

Blue Prairie Group is an independent, fee-only retirement and investment firm with three core practice areas: ERISA, Foundations & Endowments and Wealth Management.

We are recognized as one of the premiere retirement and investment consulting firms in the country. Inc. Magazine recently named us one of the fastest growing, privately held companies in the country and Registered Rep Magazine named Blue Prairie Group one of the top 50 independent Wealth Manager RIA firms in the country.

For more information about the firm and its services, please visit www.blueprairiegroup.com.

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