Professionals are leaving low satisfaction jobs in droves, as they are searching for an opportunity to move into a role designed for high achievers who work with a sense of urgency, want to impact lives, perpetuate legacies, and seek some autonomy and variety in their work. If you have more than 5 years' successful experience in multi-disciplined consulting with high-net-worth (family) business owners, then this position with The Rawls Group (TRG) would be a great opportunity for you.

The Rawls Group is built upon a team of professional business advisors with a variety of backgrounds, including financial services, portfolio management, tax, and legal; C-Suite and executive management; organizational development, coaching, and facilitation; family office, governance, and counseling. Whatever their background, our professionals are directly involved in helping our clients pass their business to and through the next generation of owners and leaders. The Rawls Group's mission is to Impact Lives and Perpetuate Legacies, which in turn leads to multi-year relationships rather than a one-time transactional engagement.

For over 50 years, The Rawls Group has been assisting business owners transition their legacy by clarifying client goals and values; optimizing their life's work by building state of the art and sustainable business structures and estate plans; developing strategic and operating plans; building management synergy; identifying and developing potential successors and leaders; enhancing wealth; and navigating the family dynamics and governance issues that are part of the transition process. The Rawls Group is seeking succession planners and business transition specialists who find these challenges fulfilling. An action-oriented approach to life, a high degree of self-confidence, and an ability to work independently as well as part of a team are key attributes of the successful candidate.

WHAT YOU WILL DO

The Succession Planner's overall responsibilities are broad in scope, built within a project management framework, encompassing various activities, often requiring rapid shifts in priorities. The Rawls Group offers a unique opportunity to experience many critical aspects of the business through a rotational training and development program for newly hired Succession Planners, providing each with a solid understanding of the Succession Matrix®, TRG's unique client servicing and deliverable process, and the opportunity to work with and around all members of the organization. The Rawls Group is committed to investing in the training and development of each individual and providing the exposure and opportunity to work with various departments, including Client Servicing, Case Development, Business Operations, and Presentation Support, to give the candidate focused direction to master our client servicing expectations and implementing TRG's proprietary Succession Matrix® process. As Succession Planners continue to hone skills, they will move to actively supporting and participating in client meetings and presentations. Frequent interaction with support staff, other Associates, Directors, and Senior Leadership, all of whom will coach and mentor, will help new team members become integrated into TRG's culture, and champion the success as a Succession Planner.

WHAT YOU WILL BRING

Required:

- Exemplary communication and presentation skills
- Exceptional client service skills demonstrated through experience, ideally with experience serving capital-intensive, high net worth, complex businesses, and family environments.

- Excellent interpersonal skills and a collaborative leadership style
- Strong project, time management, and organizational skills
- Strong analytical and problem-solving skills
- Intellectually curious mindset; continuously develops subject matter knowledge
- Ability to look at situations from several points of view
- Ability to professionally navigate sensitive, emotional, and business issues with compassion
- Willingness to travel (50%+)

Preferred:

- Exceptional client relationship management skills - new & existing
- Ability and desire to develop business and personal networks
- Working towards or the completion of one or more financial certifications: CFP, MBA, ChFC, CPA, CLU, JD, MA/MS in Leadership, Organizational Development, and/or Family Therapy.
- Leadership, management, counseling, coaching, and/or mentorship experience
- Successful new business development experience through referrals, networking, marketing, or other methods

EDUCATION, EXPERIENCE, & CERTIFICATIONS

- 5+ years of experience working with high-net-worth business owners in either one or more areas of professional services consulting; financial, management, operational, organizational and/or family business consulting
- Bachelor's degree with a preferred focus in relevant areas
- Business, finance, insurance, law, and/or counselling/coaching experience

WHAT YOU WILL GET

The opportunity to join as a pivotal member of our team focused on business succession planning in capital-intensive and complex businesses and family environments, driving impactful long-term value to business owners. In this client-facing planner position, you will have the opportunity to continue to hone your professional skills, develop vast professional networks, and work alongside highly skilled and tenured Succession Planners and other planning experts and financial analysts across the company.

Generous base salary and benefits packing, along with a variable compensation opportunity, including:

- Competitive base salary, and an incentive compensation schedule per role matriculation
- Managed Time Policy
- 401(k) retirement plan
- Medical, dental, vision, life, and disability insurance plans
- Professional and Career development

For more information, please email jobs@rawlsgroup.com or call 407-578-4455 (Amy Rawls)