Professionals are leaving low satisfaction jobs in droves. They want 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 want some autonomy and variety in their work.

The Rawls Group is just the place for high achievers, who work with a sense of urgency, and are driven to get things done. If you have more than 5 years' successful experience in multi-disciplined consulting with high-net-worth (family) business owners, then we would like to talk with you. Today.

Our Team of advisors include professionals with a variety of backgrounds. Some have come from the financial investment field; some have broad business experience at the C-Suite level; some have organizational development and coaching backgrounds; and some have counseling backgrounds.

Whatever their background, our professionals find themselves involved in helping clients pass their business to and through the next generation of owners and leaders. That is usually a multi-year relationship rather, than a one-and-done event.

For more than 4 decades, The Rawls Group (www.rawlsgroup.com) has been assisting business owners pass along their legacy by clarifying clients' interests and values; optimizing their business structure 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. If you are the kind of person who finds these challenges fulfilling, then you already know it takes 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.

As our reputation continues to spread on a global scale, we have opportunities available in Florida, Los Angeles, and Georgia; however, experienced Succession Planners looking for a way of life as well as a means to a living are always welcome to talk with us about developing a relationship with The Rawls Group.

WHAT YOU WILL DO

Your overall responsibilities are broad in scope, encompassing various activities, often requiring rapid shifts in priorities. The Rawls Group offers a unique opportunity to experience many critical aspects of our business through a rotation program when you initially join us, providing you with a solid understanding of the Succession Matrix® and our organization. You will gain exposure and have the opportunity to work with various departments, including Client Servicing, Case Development, Business Operations, and Reporting and Presentation Support, to give the candidate focused direction to master our client servicing expectations and implementing our proprietary Succession Matrix® process. As you continue to hone your skills as a Succession Planner, you will actively support and participate in client meetings and presentations. You will interact with support staff, Directors, Associates, and Senior Leadership, all of whom will share their knowledge, help you become integrated into our culture, and champion your success as a Succession Planner.

WHAT YOU WILL BRING

Required:

- Exemplary communication and presentation skills
- Exceptional client service skills
- 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, ChFC, CPA, CLU
- 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)