

Well-Rounded Success™ Partner

Job Description & Ideal Characteristics

Well-Rounded Success™ Vision Statement

Impact communities by encouraging individuals to define their own paths, handle their responsibilities, and to give back while on their journeys.



Work with Dan Andrews, Founder, Leader, and CERTIFIED FINANCIAL PLANNER™ to grow Well-Rounded Success™ into our company's next evolution. Since 2014, the foundation of this company has been built. It's time to help more people in more strategic ways with their Personal Finance responsibilities, their life paths, and their philanthropic efforts.

Well-Rounded Company Vision

Always remember, we are designing a client experience. I envision our experience to be like a performance where we entertain people first and then ensure they leave our experience better educated. Money is a tool to live one's best life so we'll coach people in the psychological ways to pursue a great life and how to best use money to accomplish that.

Dan has skills in behavioral finance, content creation, building client relationships, investments, operations management, and enhancing the client experience. An ideal partner will have skills in technical financial planning and the ability to handle company operations alongside Dan. Right now, we wish to better our processes in Compliance, Accounting, and our Back-of-the-House Operations.

When a technical Financial Planner joins our team, we can rebrand Well-Rounded Success™ to Well-Rounded Financial Planning™ so we can do better retirement projections, tax planning, debt management, and cash flow planning. These crucial areas of Financial Planning will be complemented with Dan's focus on Financial Life Planning, behavioral finance, psychology with money, goal setting, and making the Financial Planning process engaging for our clients.

I envision a partner to be able to generate new business and revenue streams where we can split revenue as a team instead of our separate 'books of business.' We can also discuss ownership options since I believe it's important for team members to have a vested interest in the value they provide for their companies.

This partner will be able to handle the business so Dan can leverage his skills to write a book to help people and promote the company. This book can launch consulting efforts and speaking opportunities which can produce revenue for our company.

What's In It For You

Flexibility to work remotely and be in charge of your own schedule.

- Each Monday morning, Dan and you will meet for 90 minutes over video conference to establish week's goals and go over the last week's goals.
- We'll maintain communication throughout the week when needed over video conference and in Slack software.

The ability to add to a company without having to worry about all the necessary launch tasks like business formation, software selection and implementation, website building, branding, and trademark filings.

Build alongside Dan a lifestyle Financial Planning practice so you can live a life important to you while making a difference in our clients' lives.

Non-Negotiables

Either currently a CFP® or pursuing this designation.

Drinks the Fee-Only Fiduciary 'Kool Aid' in our Financial Planning profession.

Practice what we preach in being Well-Rounded.

Self-driven to start projects and hold self accountable to get work done.

Strong communication skills with a focus in transparency, honesty, and authenticity.

Holds self to high standards and expects a lot out of other team members.

Ability to bounce back from 'ruts' and ensure that we find ways to have fun ourselves when handling our company as well as to make the client experience more fun than what they expect in typical Financial Planning services.

Software Systems

We currently operate with these software systems and processes. We are open to revisiting certain softwares and/or adding new processes per your own expertise and skills. As a partnership, we'll discuss the pros and cons of all of these softwares to enhance internal operations as well as the client experience.

Advizr Financial Planning Software, TD Ameritrade, Slack Communication Systems, Wealthbox CRM, Google Drive, DataPoints, my529, G-Suite, Betterment for Advisors,

Quickbooks Online, Docusign, Zoom, WuFoo, MessageWatcher, ScheduleOnce, Boomerang, Google Voice, SumoMe, Wordpress, Mailchimp, Windows Movie Editor, SmartRIA, WaveApps, Evernote, and/or Social Media (Facebook, Instagram, LinkedIn, Twitter, and YouTube).

Future Projects

The future of our company has some big goals and projects on the horizon. These are some ideas which can be places to immediately contribute your skills, knowledge, and work ethic.

- Add another Investment Service with TD Ameritrade Platform.
- Write and distribute a book to act as a training manual for New Adults.
- Well-Rounded Success™ team benefits.
- E-Courses curriculum and series as a training manual for New Adults.
- File annual taxes for clients.
- 100% Socially Responsible Investing portfolios.
- Rebrand company to Well-Rounded Financial Planning™ and revamp website.
- Register as a B-Corp.
- <Insert Your Own Ideas Here>

Communicate Interest

Please follow these instructions if you want to have a conversation about this opportunity.

1. Film a video (90 seconds max) explaining why you're interested in this partnership opportunity and which skills you're looking to contribute and gain as a Partner. Also mention how you will enhance the client experience.
2. Upload this video to YouTube privately and then email the link of your video, your résumé, and your cover letter to dan@wellroundedsuccess.com.
 - a. Inquiries with only a résumé and cover letter will not be considered.