

Client Relationship Advisor
F5 Financial Planning | Naperville, IL

About F5 Financial Planning

F5 Financial Planning is an independent, fee-only wealth management firm, overseeing approximately \$170 million in client assets. We provide comprehensive financial planning and investment management to a select group of clients, focusing on long-term relationships, thoughtful advice, and high-touch client experience.

We are a growing firm seeking a Client Relationship Advisor to help deepen client relationships, deliver high-quality planning, and support our continued growth.

Position Overview

The Client Relationship Advisor will serve as the primary point of contact for an established portfolio of approximately 70–100 client households representing nearly \$100M in assets under management. This role focuses on delivering exceptional client experience through relationship management, financial planning support, and ongoing service. Responsibilities include conducting both in-person and virtual client meetings, supporting the client onboarding process, and collaborating with prospective clients as needed.

This is not a sales-focused role, and cold calling or active prospecting is not required. The ideal candidate will be relationship-driven, highly organized, and committed to providing personalized financial guidance and service. Candidates must reside within commuting distance of Naperville, IL.

Key Responsibilities

Client Relationship Management

- Serve as lead advisor for an assigned group of clients
- Build deep, long-term relationships based on trust and proactive communication
- Conduct regular client meetings (annual, semi-annual, and as needed)
- Respond promptly to client inquiries and provide ongoing guidance

Financial Planning & Advice

- Deliver comprehensive financial planning across retirement planning, cash flow and tax-aware strategies, investment allocation, and risk management
- Update and maintain financial plans
- Identify planning opportunities and recommend appropriate strategies

Investment & Account Oversight

- Collaborate with the firm on portfolio implementation and monitoring
- Communicate investment strategy and performance to clients
- Ensure portfolios remain aligned with client goals and risk tolerance

Client Experience & Retention

- Ensure high-quality, consistent client experience
- Anticipate client needs and proactively add value
- Support client retention and satisfaction
- Identify opportunities for referrals or additional services (no hard sales expectations)

Team Collaboration

- Work closely with support staff and firm leadership
- Delegate and coordinate tasks such as paperwork, account setup, and follow-up
- Contribute to improving firm processes and client experience

Qualifications

Required

- 3–8+ years of experience in wealth management or financial planning
- Experience managing client relationships directly
- CFP designation (or actively pursuing)
- Strong understanding of financial planning and investment principles
- Excellent communication and interpersonal skills

Preferred

- Experience in an RIA or fee-only environment
- Familiarity with financial planning software (e.g., eMoney, RightCapital)
- Ability to manage multiple client relationships with high attention to detail

Compensation & Benefits

- Base Salary: \$70,000 – \$120,000 (depending on experience)
- Bonus: Performance-based
- Total compensation aligned with experience and impact

Additional benefits include retirement plan, paid time off, and continuing education support.

Career Path

This role offers a clear path for long-term growth within the firm, including increasing responsibility and client complexity, expanded leadership opportunities, and potential for future participation in firm growth.

Why Join F5 Financial Planning

- Collaborative, team-oriented environment
- High-quality client relationships
- Opportunity to make a meaningful impact on clients' lives
- No product sales or quotas
- Remote work environment / flexibility in work hours

How to Apply

Please submit your resume and a brief note outlining your interest in the role and your experience working with clients, [HERE](#).