

## **CPAlliance<sup>®</sup> Relationship Manager**

The CPAlliance<sup>®</sup> is a Turnkey Asset Management Program (TAMP) designed by CPAs for CPAs. It is an elite network of CPA financial planners who are registered investment advisors, uniquely qualified to help clients achieve and protect financial independence.

### **Job Purpose:**

Responsible for recruiting new CPAlliance<sup>®</sup> Members, coaching, mentoring, and training them, then continually maintaining a relationship to ensure continued growth and support of member firms. Minimum of 5 new firms per year and bringing each new firm to \$10mm AUM within 12 months of GoLive. Must be a CPA or willing to obtain CPA credential.

### **Job Duties:**

- Responsible for recruiting new CPA Firms to the CPAlliance<sup>®</sup>.
- Responsible for coaching, mentoring, and training them into growth as an RIA firm.
- Held to a high standard of business development activity and top line revenue growth.
- Plan, coordinate, and co-host CPAlliance<sup>®</sup> weekly SMART Group calls to assist firms in business development.
- Sales & marketing activities such as attending conferences, conducting speaking engagements, sales-funnel management and follow-up, and general sales and marketing tasks.
- Responsible for all projects and duties to include individual client engagements, sales follow up activities, and general administrative tasks.
- Participate in strategic planning.
- Coordinate support needs of CPAlliance<sup>®</sup> Members with Assistant Director and other department leaders.
- Learn, grow, be flexible, be candid, and help the firm “see around corners.”

### **Skills and Qualifications:**

- Bachelor's or Master's degree in Accounting or related field
- Series 65 or qualifying designation (CFP<sup>®</sup>, CFA, ChFC, CLU, PFS), or willing to obtain
- CPA, or willing to obtain
- Strong business development skills and aptitude to grow a business
- Time management
- Investment advisory experience preferred

**Compensation & Benefits:**

- Generous compensation packaged based on production and client (CPA Firm) growth, with unlimited earning potential.
- Benefit highlights include health, dental, vision, and long-term disability insurance, escalating paid vacation, paid sick time, paid holidays, employer-paid life insurance, 50% 401K match, employer-paid CPE, quarterly bonus, and travel and expense reimbursement.

**Location & Hours:**

Lakeland, FL (33801), Monday – Friday, 8 am to 5 pm; overnight travel and after hours work often needed.

**What's next?**

Send your resume to Susan Starr at [Susan@cpsinvest.com](mailto:Susan@cpsinvest.com) and take our 7-minute survey below.

<https://surveys.cultureindex.com/s/Oq2VWnBAgy/87164>