MERIDIAN
Financial Partners
Clarify the path. Enjoy the journey.

Position Description

Title: Lead Advisor

Reports to: Director of Advisory

Benefits: Yes

Status: Full time

About Meridian Financial Partners

Headquartered in Warrenton, Virginia, Meridian Financial Partners provides holistic financial solutions to individuals and organizations nationwide. The firm offers deep expertise and services in investment management, financial planning, and strategic integration of financial resources.

Meridian is one of the rare few that offers unique guidance and solutions to help clients create and manage a clear financial path to their life goals. The firm's partners have earned the unwavering trust of many long-term clients, who enjoy financial peace of mind as a result of the knowledge, customized care and—most especially clarity—that Meridian consistently delivers.

Position Overview

The Lead Advisor is a key client-facing role responsible for building and managing long-term client relationships while delivering holistic, fiduciary financial guidance. This position leads client engagements with clarity and confidence, integrates comprehensive financial planning and investment strategies, and serves as a trusted advisor to clients at every stage of life. We are looking for someone with the following skills and characteristics:

- Ability to build, manage, and sustain long-term client relationships
- Strong interpersonal skills and emotional intelligence
- Commitment to unbiased transparent recommendations
- Proactive approach to client needs and potential risks
- Collaborative approach to working with investment, operations and planning teams

About You

You are an experienced, client-centered advisor who leads relationships with confidence, integrity, and care. You take a holistic approach to financial planning, communicate complex concepts with clarity, and proactively guide clients through important financial decisions. You value collaboration and delivering a seamless client experience. As a CFP® professional, you hold yourself to the highest fiduciary and professional standards and contribute positively to firm culture and long-term growth.

Job Description and Responsibilities

The Lead Advisor will have the following responsibilities:

- Serve as the primary advisor and relationship lead for assigned clients
- Lead client meetings and deliver holistic financial planning and investment guidance
- Develop, implement, and regularly update comprehensive financial plans aligned with client goals
- Provide clear, unbiased recommendations while acting in a fiduciary capacity
- Collaborate with the investment team to align portfolios with client strategies and risk profiles
- Monitor client progress and proactively recommend adjustments as life circumstances or markets change
- Communicate complex financial concepts with clarity and confidence
- Mentor and support
- Contribute to firm growth through strong client relationships, referrals, and professional presence

Qualifications

- Bachelor's Degree
- CFP®
- 6+ years' experience

Salary and Benefits

- Competitive pay
- Team based incentive plan
- Medical and dental insurance benefits
- Retirement plan match
- Paid vacation