



Client Relationship Manager

Ft. Lauderdale, FL or Boone, NC

THE OPPORTUNITY

Sterling Wealth Advisors® is seeking a Client Relationship Manager to join our team. This full-time role offers a collaborative, growth-oriented environment with opportunities for career progression and professional development. If you have a passion for financial planning and a client-first mindset, we'd love to hear from you!

SCHEDULE & BENEFITS

- This is a full-time (40 hours/week) hybrid position requiring a consistent in-office presence of 4 days per week with 1 remote day. This schedule supports daily operations, team collaboration, training, and relationship building.
- We offer a competitive base salary based on roles, experience, skill set, and location.
- Retirement plan match
- 4 weeks PTO (including holidays)

ADDITIONAL BENEFITS INCLUDE

- Sponsorship for continuing education, including Series 65, CFP®, CFA®, EA, and CKA® designations.
- A supportive, expert team with a strong work-life balance—summer months are typically more relaxed for internal projects, while spring and fall are client-focused.
- Mentorship from Elizabeth Barrett, CFP®, CKA®, and MA in Counseling Psychology, offering a unique perspective on financial planning and behavioral finance.

WHAT YOU'LL DO

- No sales are required.
- Move money between client accounts.
- Assist advisors by building and maintaining client relationships through processing requests, opening new accounts, resolving issues, handling paperwork, generating reports, and conducting account reviews.
- Update financial plans for clients using Money Guide Pro.
- Prepare for client meetings and sit in meetings to manage notes and action items.
- Prioritize daily work, track progress for current work, and consistently meet deadlines.
- Guide clients through financial tasks via Zoom, such as funding HSAs, enrolling in Medicare or Social Security, allocating 401(k)s, freezing credit, and more.

WHAT WE'RE LOOKING FOR

- Bachelor's degree in financial planning, finance, or related field.
- Strong computer literacy, including Excel and Word, and basic 1040 tax knowledge.
- Passion for client service, financial planning, and continuous growth.
- A proactive team player who takes initiative and communicates clearly.
- High level of discretion and commitment to maintaining client confidentiality.

To apply, please submit your resume and cover letter to Lanette@SterlingWealthAdvisors.com.

About Sterling Wealth Advisors®

Sterling Wealth Advisors® is a fee-only fiduciary firm specializing in financial planning, retirement planning, investment counseling, and tax strategy. We are committed to helping clients align their financial decisions with a fulfilling and purpose-driven life. We do not sell products and only work for our clients.