Vice President, Investment Consulting

Target Compensation: On-target earnings are uncapped. Based on the Year 1 production model, we estimate most candidates will land between $350,000 and $450,000+ in their first year, driven primarily by incentive compensation paid on closed AUM.

Location: Remote | Hybrid (U.S.) | Periodic travel to Boston HQ

Reports To: Chief Operating Officer

Job Summary

Join Winthrop Wealth as our Vice President, Investment Consulting, the firm's first dedicated role focused on converting qualified high-net-worth prospects into long-term advisory relationships. In 2026, Winthrop Wealth is building a more repeatable B2C acquisition function as part of its Build to Scale initiative, and this role sits at the center of that effort.

You are not a traditional closer and you are not a traditional advisor. You are the gateway. You hold the client relationship through the full acquisition cycle, running discovery, developing a genuine understanding of each prospect's financial situation, and providing the initial planning context that helps us align them with the right permanent advisory home. You close the relationship with the firm, not with yourself. That distinction is intentional, and it is what makes this role different from anything else in the market.

Winthrop Wealth is not a finished product. The planning infrastructure, the technology platform, and the acquisition engine are all continuously evolving, and this role sits at the center of that build. If you are looking for a firm where everything is already figured out, this is not it. If you are looking for a firm with strong fundamentals, serious client relationships, and the intentionality to build the infrastructure that makes the next decade possible, this is exactly it. What we are building in 2026 will determine what we are worth in 2031. We want the person in this seat to understand that and be energized by it.

Responsibilities

As our Vice President, Investment Consulting, you will:

Drive new client acquisition and revenue growth by:

- Owning the full client acquisition cycle for high-net-worth prospects sourced through paid channels, firm inbound, COI activation, and other firm-generated lead flow, running a disciplined meeting process from Discovery through Alignment to signed advisory agreement
- Serving as the prospect's primary point of contact through the acquisition cycle, building genuine credibility around Winthrop Wealth's planning-led service model rather than transactional or product-led positioning

- Conducting initial discovery conversations that develop a real understanding of each prospect's financial situation, concerns, and goals, providing the planning context that makes the permanent advisor alignment meaningful rather than transactional
- Maintaining clean Salesforce pipeline records, including source attribution, persona notes, stage and next-step dates, expected fees, and close results, so the firm sees the funnel in real time
- Following up with discipline and on cadence, recognizing that consistent outreach, documented next steps, and orderly pipeline progression are what separate sustained performers from one-month wonders
- Prospecting independently when paid lead flow tightens or quality shifts, never relying solely on a fed calendar to sustain pipeline
- Operating within Winthrop Wealth's compliance framework on every call and throughout the acquisition process, including required disclosures, recording-consent requirements, privacy and recordkeeping obligations, and the boundaries of advisory, solicitation, and sales activity at each stage of the process, as well as any licensing or registration requirements associated with the role

Build and codify a scalable acquisition engine by:

- Partnering with the COO to help document and refine components of the acquisition process, including discovery approaches, objection-handling guidance, meeting frameworks, and proposal practices that will support future hiring and training
- Identifying where conversion breaks, where coaching is needed, and where the system should evolve as the firm learns, and bringing those observations into weekly and monthly process reviews
- Contributing to source-level CAC tracking and funnel conversion reporting so the firm understands which lead sources, personas, and process moves drive economic returns
- Supporting the build of the firm's sales artifacts, including call recordings reviewed for coaching insight, KPI dashboards, role-play rubrics, and onboarding materials that will be used by future hires
- Using approved firm technology, including AI-enabled tools and sales technology, in accordance with firm policy, confidentiality requirements, and compliance-approved workflows to support prospect research, communication preparation, and pipeline efficiency
- Operating with the recognition that Year 1 is not just a production year; it is the year that determines whether the acquisition function becomes a department, and your fingerprints will be on what gets built

Lead, coach, and connect across the firm by:

- Partnering with the COO and senior leadership on advisor allocation decisions, contributing your perspective on which advisor is the right match for each new client based on personality fit, planning needs, and capacity
- Coordinating clean handoffs between yourself and the receiving advisor, preserving the trust and relationship momentum built during the acquisition cycle through the transition to ongoing service

- Collaborating with Operations, Client Service, and Compliance to ensure new clients move smoothly from signed agreement to onboarded, planned, and serviced
- Representing the B2C acquisition function in cross-functional initiatives and helping advisors understand the value of firm-sourced client relationships
- Serving as a thought partner to the COO as the firm prepares to scale the acquisition function in Year 2 and beyond, including input on hiring profile, training design, and process refinement for future hires

Salary & Performance

On-target earnings are estimated to be between $350,000 and $450,000+ in Year 1, driven primarily by incentive compensation paid on closed AUM. The incentive structure pays 40% of first-year advisory fees in Year 1, 20% in Year 2, and 10% in Year 3 on every client relationship you close, meaning the book you build pays you for three years, not one.

The ceiling is yours to set. There is no cap on what this role can produce, and we are not going to pretend otherwise. If you close $100M in Year 1, the math reflects that. If you close $150M, it reflects that too. The accelerators above the Year 1 target are defined, the economics are transparent, and the upside is real.

We recognize that a top performer in a comparable role is probably not looking at this and seeing a lateral move on paper. The floor here is lower than what a top-producing VP at a scaled firm is earning today. That is the honest trade. What you are walking away from is a ceiling, a territory, a centralized lead machine you did not build, and a service model you did not design. What you are walking into is the opportunity to build the acquisition function from the ground up, own the process, and be compensated for every relationship you bring into the firm for three years, not just the year you close it.

To support a clean transition, the position includes a six-month ramp guarantee that establishes a compensation floor while your pipeline builds. If your earned incentive exceeds the guarantee, you keep the difference. The guarantee is ramp support, not a separate compensation layer on top of what you close.

Performance is assessed against measurable acquisition outcomes that include new closed AUM, Discovery and Alignment conversion rates, average client size, customer acquisition cost by source, Salesforce pipeline hygiene, contribution to playbook and process development, and successful client handoffs to the advisory team. A six-month review gate uses real funnel data, not optimism, to inform decisions about spend, scaling, and process.

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Career Pathways

The growth path in this role is real, and it is tied directly to what you produce. Year 1 is not a management year; it is a proof-of-concept year, and the COO owns the function through that period. That is intentional. Winthrop Wealth is building something it has not built before, and the first hire needs to be a closer first, a builder second, and a future leader third, in that order.

If the model proves out, the path expands with it. A Vice President, Investment Consulting who performs consistently, codifies what works, and earns the trust of the advisory team is the natural candidate to become the player-coach for new hires. That is not a title change for its own sake; it is a function that needs to exist when the department scales, and we intend to build it from within. Any future title, reporting, or supervisory changes would be determined by the firm at that time.

The cross-functional visibility in this role is genuine. You will have direct access to firm leadership, a real voice in how the acquisition function evolves, and exposure across advisory, operations, and compliance. That foundation matters regardless of where your career goes inside or outside the firm.

This role may be the one for you if:

- You have closed high-net-worth prospects in financial services and you can walk through your numbers, close rate, average case size, pipeline size, without hesitating
- You are not looking for a management title yet. You want to close, build something, and earn expanded influence through production, not through org chart positioning
- You do your best work when you own the full cycle. Hand-offs, shared pipelines, and team-sourced credit are not how you want to be measured
- You are tired of a model where you close the client and immediately hand them to a call center. You want to actually understand who you are bringing into the firm, and you want the discovery process to mean something, even if the long-term relationship lives with someone else
- You have spent years in a high-volume, high-churn environment and you are good at it. But you are ready to close something you are actually proud of, not just something that clears compliance
- You know what a fed calendar feels like, and you know what happens to your pipeline when it goes quiet. You fill that gap on your own; you do not wait for the next intro to appear
- You treat follow-up, CRM documentation, and call prep as part of the close, not as administrative overhead that competes with it
- You have operated in a structured sales methodology, NEPQ, Sandler, or something comparable, and you can explain what you actually use and why, not just name it on a resume
- You are honest about what you do not know. If a prospect mentions an irrevocable trust or a concentrated equity position and you are not yet fluent there, you know how to stay credible while you learn

- You are energized by being early. The absence of a playbook does not frustrate you; it is part of why you are interested
- You are comfortable receiving structured feedback through call reviews, debriefs, and KPI discussions designed to improve performance and consistency

Qualifications

- 5+ years of progressive experience in client acquisition or sales within an RIA, wealth management firm, broker-dealer, or comparable financial services environment; demonstrated track record of closing high-net-worth prospects through a structured sales process strongly preferred
- Demonstrated ability to convert cold and warm prospects into long-term advisory relationships, with documented results in average case size, close rate, and pipeline management
- Proven track record of building, improving, or contributing to sales playbooks, scripts, objection libraries, or training materials; evidence of process orientation, not just closing instinct
- Conversational fluency in investments, taxes, retirement income, and estate planning topics that arise in high-net-worth conversations, including RMDs, Roth conversions, qualified vs. non-qualified assets, fiduciary standard, liquidity events, and business sale proceeds
- Series 65 license or equivalent required.
- Exceptional written and verbal communication skills, including comfort with recorded calls, structured coaching reviews, and KPI-driven performance conversations
- Proficiency with CRM and sales tooling; Salesforce strongly preferred, along with comfort with Zoom, Calendly, document collection workflows, and sequencing platforms
- Comfort working remotely with disciplined cadence, autonomous follow-up, and high-visibility accountability
- Bachelor's degree in Finance, Business, or a related field, or equivalent professional experience

Bonus Points for:

- Direct experience with NEPQ, Sandler, MEDDIC, or comparable consultative sales methodologies, and the ability to articulate which elements you use and why
- Experience using AI-enabled tools in a sales or client acquisition context in accordance with documented policies and supervision, including Gong, Chorus, Clay, AI-assisted CRM, or prospect research and enrichment workflows
- Closing experience at a leading RIA, wealth advisory firm, or high-net-worth-focused practice, including Fisher Investments, Creative Planning, Edelman Financial Engines, Mariner Wealth, Schwab Private Client, Fidelity Wealth Management, or comparable
- CFP, CFA, or other advanced industry designation

- Familiarity with Salesforce Financial Services Cloud, eMoney, Addepar, or comparable wealth management platforms
- Experience contributing to or leading the build of a sales playbook, training curriculum, or onboarding program from scratch

Who We're Looking For

This role is a fit for an experienced closer who can convert qualified opportunities, develop genuine insight into each prospect's financial situation, document effective practices, and operate within a structured compliance framework. We care less about a specific firm pedigree and more about a demonstrated track record of production, follow-through, and the discipline to make a sales motion repeatable. If you are someone who closes hard, documents what works, and wants to build something that scales beyond yourself, we want to hear from you.

About Winthrop Wealth

Winthrop Wealth provides planning and advisory services to high-net-worth and ultra-high-net-worth individuals and families. The firm is headquartered in Boston, Massachusetts, and has advisors located in Westborough, Massachusetts, New York, New Hampshire, Connecticut, Washington State, and Arizona.

Winthrop Wealth seeks to deliver incredible client experience and consultation to help our clients live life to the fullest. Our love of results, appreciation of clients, and respect for one another makes Winthrop Wealth a fast-growing and innovative company with an incredibly strong culture, and in 2026, we are building the infrastructure to make that culture scale.

Winthrop Wealth is an equal opportunity employer and provides reasonable accommodations to applicants and employees in accordance with applicable law.

Industry: Financial Services