Clark & Company is a boutique wealth management firm specializing in serving the needs of a select group of high net-worth individuals, corporate executives, businesses and endowments. Located in the greater-Buffalo area, Clark & Company offers comprehensive financial planning through our broker/dealer, Lincoln Financial Securities Corporation*.

Clark & Company offers the freedom to do what’s appropriate for each client. Our business-mix is a combination of commission and fee-based accounts, with no requirements as to product-mix or use of proprietary offerings.

We work in close consultation with clients’ attorneys, accountants and business managers to provide tailored advice and solutions based on their unique circumstances.

Tailored

At Clark & Company, we can afford to be precise. We work hard to maintain an advisor to client ratio that allows us to provide only the highest levels of service. Clark & Company is committed to a concierge model; we’ll work with our clients to understand their vision and then work harder to build the plan that will help them get there.

Clark & Company understands that no two clients are alike and no two dreams the same.

Trusted

While Clark & Company works in close collaboration with its advisors, we do not promote a one-size-fits-all culture. Each of our representatives manages their own clients in the manner they see fit. Clark & Company acts as your back-office, coach and problem solver. Clark & Company is at YOUR service so you can cater to your clients.

A trusting approach, one predicated on personal relationships is one reason Clark & Company is not a job, but a career.

Together

Just as Clark and Company is committed to partnering with our clients to help them realize their dreams, we’re looking for outstanding professionals with an eye towards growth opportunities.

At Clark & Company, we leave nothing to chance. We offer transition assistance to get you started, comprehensive support to help you grow and succession planning to help you maximize your business’s value at retirement.

Whether you are already in the independent channel and looking to change firms, or with a wirehouse and looking for a straightforward compensation structure, we have something to offer. And we fully expect that when you join Clark & Company, you'll be making a career decision.

At Clark & Company, we'll grow together. Welcome.

If you're looking for a place to grow your business and the freedom to employ a relationship approach with a select number of clients, Clark & Company may well be the opportunity you've been waiting for.

Highlights

- Open architecture platform with a full range of investment products
- Top-notch support staff
- Competitive, flexible payouts
- Health Insurance
- Succession planning
- The Book of business is YOUR transferable asset
- Performance-based incentives

Application Requirements:

- Bachelors degree
- CFP (or designation within two years of hire date)
- Series 7, 63, New York Life Accident & Health License
- Excellent communication (written and oral) skills, polished sales and presentation skills are a must.
- Ability to transfer a high percentage of existing client base to new broker/dealer.
- Has demonstrated a history of success and possesses an entrepreneurial spirit.
- (preferred) CFA, CPA, MBA, JD

Please contact Craig Clark, CFP® at 716-312-7918 or email careers@clarkwm.com for more information.

**Advisory services and securities are offered through our broker dealer, Lincoln Financial Securities Corporation, member SIPC and a registered investment advisor.*