



# Career Paths

**Kelli Cruz**  
**Founder & Managing Director**



# What is a Career Path?

---

- It is a defined plan for progress, development, and growth over the employee's career.
- It covers the progression of their skills, and experience.
- It provides opportunities to move laterally in addition to the more traditional approach of “moving up” in the organization hierarchy.

# Career Paths – Key Criteria

---

- Clearly defined
- Goal-driven
- Communicated and understood
- Based on both knowledge and experience
- Consistent
- Real
- Tied to firm strategy and profitability

# Advisor Career Path & Progression

	Associate Advisor (Level 3)	Service Advisor (Level 2)	Lead Advisor (Level 1)	Partner
<b>Responsibilities:</b>	Provides support to advisors before, during and after client meetings.	Provides support as “second chair” to lead advisor(s) & manages day -to -day interactions with existing client relationships.	Successfully establishes and leads new client relationships. Manage and lead advisor team(s).	Develops opportunities and manages the firm. Serves as a Lead Advisor, business manager or both.
<b>Revenue Managed:</b>				
<b>New Business:</b>				
<b>Client Relationships:</b>				
<b>Years of Experience:</b>				
<b>Time in Role:</b>				
<b>Additional Credentials/ Education:</b>				
<b>Training Targets:</b>				
<b>Performance Rating:</b>				
<b>Leadership/ Management Skills:</b>				
<b>Demonstrates Firm’s Core Values:</b>				
<b>Compensation:</b>				

# Operations/ Administration Career Path & Progression

	Administrative Assistant	Client Service Administrator	Operations Manager/ Client Service Manager	Chief Operations Officer/ Partner
<b>Responsibilities:</b>	Performs administrative and clerical duties such as typing correspondence, memoranda, reports, and meeting notes; scheduling appointments and meetings; in support of the office.	Responsible for paperwork, client reports, maintaining contact with clients, scheduling meetings with preferred staff, and troubleshooting problems	Manages daily activities within the operations department (e.g., trading and reporting) and serves as an intermediary between the department and top management.	Directs, administers, and coordinates the activities of the organization in accordance with policies, goals, and objectives of the firm. This is purely a management function and is not responsible for revenue production.
<b>Contribution:</b>				
<b>New Business:</b>				
<b>Client Relationships:</b>				
<b>Years of Experience:</b>				
<b>Time in Role:</b>				
<b>Additional Credentials/ Education:</b>				
<b>Training Targets:</b>				
<b>Performance Rating:</b>				
<b>Leadership/ Management Skills:</b>				
<b>Demonstrates Firm's Core Values:</b>				
<b>Compensation:</b>				

# Contact us:

**Kelli Cruz**

Founder & Managing Director

1233 Lattie Lane

Mill Valley, CA 94941

Office: 415-381-2087

Email: [kelli@cruzconsultinggroup.com](mailto:kelli@cruzconsultinggroup.com)

[www.cruzconsultinggroup.com](http://www.cruzconsultinggroup.com)

