



Why RTD?

Our vision is to create a place where passionate professionals want to work and clients never want to leave.

Growth from the Inside Out

At RTD, we invest in our culture and our employees because our human capital is our most important asset. For decades, we have been committed to developing and retaining great talent by creating an environment driven by our core values and inspired by our belief that growth happens from the inside out.

We are Passionately Committed to Our Values





Awards & Accolades

RTD Financial is honored to be recognized year over year for our work.



Firm Designations



Corporate Social Responsibility

We're expert advisors, but people first. Our commitment to supporting our community and giving back is one of our core values and why we established the RTD Financial Charitable Fund. Through this fund, we contribute a percentage of our profits to the fund annually and our employees recommend organizations to receive quarterly grants.

Not a Job, a Career

We believe that defined career plans create more transparency and empower our team. Every department at RTD has a step-by-step career plan so employees are aware of their growth opportunities and what is needed at every stage of their career to succeed as well as move to the next level.



Learning and Development

At RTD, we are lifelong learners and are committed to providing career growth and education opportunities for all employees. To support this, every employee has a professional development budget for continuing education and attending industry conferences of their choice. We have established an education budget, defined our career paths and also provide a Certified Coach to help our employees build professional development plans. Our employee's growth and career satisfaction is key to our team and firm's wellbeing.

RTD University

To position our team for success, we have developed a formal RTD University and Mentorship Program that pairs entry-level professionals with senior leaders for a mentoring program.

RTD University provides initial and ongoing education and training for all roles in the firm. We also provide a Certified Coach to help our employees build professional development plans, set strategic goals, learn relational skills and time management.

Our commitment to professional development prepares our team for the greatest opportunities for success with the CFP Exam Program and attaining other industry designations.



Employee Engagement

Culture is at the heart of everything we do and our employees play a major role in creating a place where passionate professionals want to work.

All employees have the opportunity to get involved with a variety of internal committees that support the firm's goals while also providing the chance to develop different skills outside of their day-to-day role. Our committees include:

- ✓ RTD Values
- ✓ Innovation & Curiosity
- ✓ Non-Profits

Benefits

Our competitive and comprehensive benefits range from 401(k) with profit sharing to parent leave to summer Fridays. Highlights include:

- ✓ **FOR TODAY**
 - Base Compensation
 - Discretionary Merit Bonus
 - Partnering for Success (PFS) Incentive
 - Client Development and Retention Incentive
 - Technology Reimbursement
- ✓ **FOR TOMORROW**
 - 401(k)
 - Match
 - Profit Sharing

Health & Wellness

- Health & Dental Insurance
- Long-term Disability
- Group Life Insurance
- Health Advocate
- Voluntary Benefits
- Health Savings Account

Life at RTD

Every aspect of our employee experience is designed to create a culture that centers around these principles:

- Doing what we love
- With the people we love
- Making a huge difference
- Always learning and growing
- Having time for other passions

Personal growth and satisfaction is extremely important at RTD. When you thrive, we all thrive.

Time for Other Passions

- Hybrid Work Days
- Flexible Hours
- Weekend Jumpstart - close at 3pm on Fridays
- Day of Service
- Company Paid New Parent Leave
- Company Paid Holidays
- Company Paid Time-Off

Learning & Growing

- Education Budget
- RTD University
- Personal Financial Guidance
- Ownership Opportunities

Fun

- Fitness Center/Showers/Game Room
- Dress for the Day
- In office Café
- Children's Art Gallery
- Fun Company Events



At RTD, we invest in our culture and our employees because our team is our most valuable asset.