

First Tech offers robust careers for Financial Advisors.

First Tech aspires to be an organization that reflects the technology-focused members that we serve. We are the credit union of choice for Microsoft, Amazon, Intel and HP employees—just to name a few. As such, First Tech is recognized as an innovative and dynamic organization built to help our members reach their dreams. We have created an opening for an experienced Financial Advisor to join our elite team of 30 financial advisors and become part of the largest credit union investment program by AUM in the United States – Addison Avenue Investment Services.

Our Financial Advisors assist clients in identifying suitable financial solutions based on their unique needs and risk tolerance and act as a trusted advisors and advocates. Qualified candidates will have at least 3 years' experience in the sale and delivery of personal investment products and services, with a proven track record in production and growing assets under management. If you're ready to be a part of a leading Credit Union Investment team, this could be the job for you.

Here's what you can expect from the job and what you need to be successful:

About the Role:

- Work with existing clients and credit union member prospects to define financial goals, identify suitable products and services based on their unique needs and risk tolerance, present customized recommendations and financial plans, offer advice and complete the sales and engagement process
- Build relationships with credit union retail teams and other credit union centers of influence
- Engender loyalty from credit union members through unbiased advice that results in earned referrals from existing clients.
- Participate in a variety of lead generating First Tech initiatives, such as providing education to the First Tech membership base, working onsite at some of the key companies we serve to provide 1:1 consulting and educational support as needed, and partner with retail, mortgage, marketing and other areas of the organization.
- Leverage all resources available to us through First Tech and our broker/dealer, Raymond James Financial Services to execute on our long term growth and client retention strategies within the Addison Avenue entrepreneurial environment.
- Maintain member/client files and books and records in compliance with the requirements of our broker/dealer, FINRA, state securities and insurance regulators as well as First Tech and its regulators, including the NCUA.

About You:

- Minimum 3 years' experience in the sale and delivery of personal investment products and services with the proven ability to act as a trusted advisor and advocate
- Ability to balance several tasks simultaneously while maintaining highest level of organization, accuracy, and efficiency
- Ability to organize, analyze and interpret data to reach sound decisions and guide investors based on individual risk tolerances

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- Proficiency with basic to complex mathematical calculations
 - Credit union or bank experience strongly preferred
 - Series 7, 63/65 or 66 FINRA licenses, Life & Disability Insurance license required; CFP preferred
 - Clean U-4

Locations: Bellevue, WA 98007; RidgePointe Branch

First Tech is not currently offering Visa sponsorship or transfers

On-line applications only, to apply: <http://bit.ly/2ID5STe>