MERCER ADVISORS™

Company: Mercer Advisors
Location: Bellevue, Washington 98004
Job Title: Financial Advisor

Mercer Advisors is a total wealth management firm that provides comprehensive financial planning and investment management services. Dedicated to improving the lives of our clients both today and through their retirement, we help them to develop a clear vision of their life goals. We then support their journey by providing comprehensive and coordinated wealth management advice that encompasses all areas of their financial life. Our staff of over 170 in 20 offices coast-to-coast includes financial advisors, attorneys, CPAs, investment experts, and other skilled and talented professionals who want to create a life of choices and freedom for each and every client. Be a part of a growing company and discover your potential.

For more information, please visit www.merceradvisors.com/careers.

Job Summary:

Listening, educating and providing clarity to clients is what you love. Our ideal candidate thrives on being a trusted advisor, is passionate about helping others, has an entrepreneurial spirit and believes strongly in providing exceptional client service. As a Client Advisor, you will work in a client-focused, team-centered environment to support the team's region-wide client service and business development efforts. This is a salaried, non-sales financial planning/wealth management position. In this role, you will collaborate with subject matter experts nationwide and be part of one of the largest fee-only wealth management firms in the United States.

Essential Job Functions for the Client Advisor include:

- Function as the primary trusted advisor to the firms high net worth clients
- Ensure retention of the firm’s clients as well as generating referrals
- Support the teams Regional Vice Presidents and Managing Directors as a subject matter expert in the areas of investments, tax planning, pension planning, estate planning, insurance, retirement planning and general financial planning
- Provide cutting edge financial planning, tax, estate, and investment advice to the firms high net worth clients
- Analyze, draft, edit, and deliver comprehensive financial plans to clients
- Analyze prospective clients investment portfolios and financial planning to support RVPs in introducing new clients to the firm
- Manage client communications and follow-up with clients other advisors
- Ensure adherence to company standards of net new asset growth and retention
- Attend company workshops or lectures and speak to groups of potential clients when called upon
- Other duties as assigned

Qualifications:

- Bachelors or Masters Degree
- Minimum 5 years of client-facing tax, wealth management or financial planning experience
- Series 65 or Series 66 license required unless candidate holds one of the following credentials: Certified Financial Planner (CFP®), Chartered Financial Consultant (ChFC), Personal Financial Specialist (PFS), Chartered Financial Analyst (CFA) or Chartered Investment Consultant (CIC)
- CFP® credential strongly preferred
- Sales aptitude and experience is also highly desired
- Excellent communication, presentation, listening, and analytical skills
- Proven time management and organizational skills in high volume, high energy environments

- Strong knowledge of and the ability to present investment, finance, insurance, and tax planning concepts
- Must be a humble, entrepreneurial, hardworking team player with a positive, can do attitude
- Strong computer aptitude with proficiency in MS Excel, Word, Outlook, and PowerPoint
- Ability to learn quickly and efficiently

Working Conditions: Professional or home office environment depending upon location, daytime hours, working inside, standing, and sitting, no heavy lifting over 10 lbs. Up to 50% travel as needed.

Benefits: We can offer you an exciting, fast-paced working environment, and the opportunity to play a vital role in our growth. Mercer Advisors is an equal opportunity employer offering a competitive salary and benefit package:

- Medical Insurance
- Vision Insurance
- Prescription Drug Coverage
- Dental Insurance
- 401(k) Profit Sharing Plan
- Paid Vacation and Holidays
- Life Insurance
- Accidental Death and Dismemberment
- Long-Term Disability
- Voluntary Life and AD&D options
- Short-Term Disability options
- Health Savings Account option
- Pre-tax Premium Only - Flexible Spending Account option
- Domestic Partner Program
- Financial Planning Service
- Employee Assistance Program

To Apply

Please submit an application via our career website at http://www.merceradvisors.com/careers.

For more information on the position, please email jennifer.mcbride@merceradvisors.com.