Heritage Wealth Advisors

Ameriprise Private Wealth Advisory Practice

Investment Analyst Job Description

We believe talented, driven people deserve more from their careers. At Heritage Wealth Advisors, you'll have the opportunity to grow professionally and personally through our career path for operations & sales professionals. We provide the tools, resources and support to help you shape a career that delivers more of what you want: work that makes a difference and impact on others!

About the Role

HWA is a privately held $2 billion Wealth Management firm and we are hiring for an experienced individual to join our growing team. The role will focus on the practice's investment management arm, including support to execute daily trades and monthly rebalances. There will also be a proactive element to the role helping to identify the top business opportunities for the advisors. There will also be a research and reporting element of the role to support sales advice and the investment committee.

Compensation to include salary as well as bonus and profit sharing to be negotiated based on:

- How well a fit there is with our Team, our Values, and our Culture.
- Previous results achieved

Job Requirements

- Bachelor's degree or equivalent work experience
- 3+ years of financial services experience
- Series 7 registered (other registrations desired like 66 or Insurance)
- Strong attention to detail is necessary,
- Analytical skills, including excel

About You

- You believe in and are passionate about our Mission and how we help the families we serve.
- You want to make an Impact with the families we serve and communities in which we live and work.
- You love working and collaborating with a team.
- You have an insatiable interest in getting better and enjoy professional and personal development.
- You thrive in a fast-paced environment.
- You have an Abundance Mindset (vs Scarcity Mindset) and sincerely believe that "You can get everything in life that you want if you will just help enough other people get what they want."
- You love working with numbers and are good at it.
- You have a thirst to learn more about the industry and get excited to research different investments

Our Mission

Through meaningful relationships, across generations, we help clients attain their highest confidence, enabling them to focus on what is most important to them, and thus make the biggest impact possible on their families and communities.

Our Culture

This is what sets us apart. We are very proud of the culture that we have built and work hard to maintain and improve it. Dan Pink's top 10 Ted Talk of all time describes the 3 things that drive engagement and motivation more than anything else, which are Autonomy, Mastery, and Purpose. We invest bigtime in these, helping our team members grow professionally and personally more than they would anywhere else, while working on a Purpose-Driven Team, that is consistently making an Impact in the lives of the families we serve and the communities in which we live in. Join us at one of our team events and get to know our team.

Our Values

- **Abundance Mindset:** We have a growth mindset versus a fixed mindset and appreciate the opportunities that are available to us- to learn, to make progress, to make a difference in our clients' lives and in our communities, to grow in our careers, and to provide for our families.
- **Leadership:** Humans crave leadership. And that is what we are: we are all leaders to both our clients and to our team members. We lead clients through the most important stages of their lives. Clients consistently tell us that our leadership has saved or made them hundreds of thousands or millions of dollars and even more importantly, given them more confidence than they've ever had. Our highest purpose is to help people be the best they can be and make the most meaningful impact possible on their family and community.
- **Personal Development/Growth:** Goal achievement is at the heart of what we help clients with. And growth is a requisite for this. We help clients have a "bias for action", avoiding analysis paralysis and the dangers of status quo. While growth requires change, which can bring discomfort, we have an insatiable appetite to help our clients and teammates grow and get better in every way possible. "If we're not growing we're dying."
- **Teamwork:** Many in our industry try to be all things to all people- generalists that often give mediocre advice in a lot of areas, vs amazing advice in a few areas. We believe the best way to make the biggest positive impact in our clients' lives, and in turn our lives, is to bring a team of specialists together on their behalf. A team of experts that spends the bulk of their time getting better and smarter in their area of focus. As the old proverb says, "If you want to go fast, go alone. If you want to go far, go as a team."
- **Health:** We help clients and each other achieve financial, emotional, and in turn physical health. Money decisions are the #1 cause of stress and the #1 cause of divorce in America. Healthy conversations around goals and priorities and proactive planning are the solution.
- **Kaizen (Constant Improvement):** Good is the enemy of great. On behalf of our clients, and each other, we will not be satisfied with good. Our team constantly looks for ways to improve, in everything we do: not just in planning strategies, but in communication, in trust, in transparency, in operations, in learning, and in leadership. If it's good, make it great. If it's great, make it even better. We realize that most of life's biggest results don't come from get-rich-quick schemes or the financial equivalent of fad diets; they come from the Aggregation of Marginal Gains. Small, but consistent gains compounded over time are life changing.
- **Impact:** Our clients are very clear about our promises and feel like we deliver on them. They feel like they have paid well for our services, but receive great value in return. Our clients repeatedly say they wish they had us full time, but are thrilled they have us for the time they do. We help clients make better financial decisions and achieve their goals, for themselves and the multiple generations in their family. Our end goal: to provide better advice and more confidence to clients than they can get anywhere else. This is Impact.

Benefits

Health Insurance- All through an easy to use online provider. Includes a Pre-Tax, Tax-Sheltered, and Tax-Free savings plan.

Dental, Disability and Life Insurance

401k- Of course, we want to help our team save for retirement! We offer a 401k plan with top rated funds and a generous employer contribution

Generous Paid Time Off- Including Market Holidays and Company Days- the work we do is important, but there's nothing more important than spending time with family and friends rejuvenating.

Professional Development, Education reimbursement, and Personalized Career Track- Learning is very important in our culture! We offer fully paid licensing and designations to encourage you to grow professionally and personally.

Company sponsored Happy Hours, Team Building, Meet-ups, and Retreats- Money is the #1 cause of stress in America, and given the weight of what we are managing for our clients, we feel it critical that we get outside of the office to build relationships with each other- to socialize, set goals, map out strategies, grow together, and most importantly to HAVE FUN!

Why Heritage Wealth Advisors

More Americans than ever are tired of supporting the Bail-Out Banks. We are Locally owned and have NEVER taken outside investment- thus, unlike almost every other major financial institution, the advice we give our clients can be truly objective, vs self-serving to the executives, shareholders, and commission-driven sales people. Through comprehensive financial planning and wealth management we give our clients access to a team of specialists in areas such as estate and tax planning, investments, real estate, trusts, and charitable giving. Our advice comes from a place of:

- **Understanding:** Every conversation and strategy is rooted in a deep and thorough understanding of our clients' needs.
- **Independence:** Our firm is 100% independent from the big bail-out banks, so the advice we give to clients is guided by the Fiduciary Standard and based on their family's financial plan; not based on what makes the most sense for the shareholders of a big bank or brokerage house.
- **Customization:** Many Americans have become tired of feeling like their advisor has a shopping cart of products and they are simply being fit into the cookie cutter. We come to the table with no preconceived notions of what families need; we start by discussing their priorities, objectives, and plans and together, we work to develop a strategy designed to align their finances with their family priorities.

Why Ameriprise

- **Financial Planning first:** Ameriprise does more Financial Planning than any other company in the world and that is at the heart of our Mission; Financial Planning is how we help the families we serve make the biggest impact possible.
- **Trust:** In an industry suffering from the lowest trust levels of all time, Ameriprise bucks that trend, garnering the highest trust levels, customer service, and customer loyalty of any firm in the industry.