

## Financial Advisor

We are looking for an exceptional person for a very important position at Merriman. We are a well established and growing registered investment advisory firm that needs people who will grow with us, personally and professionally.

### **The company**

We opened our doors in 1983 and quickly learned that money management is not about managing money. It's about helping people the way we would want to be helped.

Today we manage approximately \$2 billion in investments, giving ongoing investment advice to thousands of Clients across the country.

We are highly selective in choosing our team members, who bring enthusiasm to their jobs, who enjoy each other and who take pride in working together to provide extraordinary service to our Clients. We are highly respected in our industry, and we value our integrity above all else.

### **The job**

Overview: You will be a critical part of our team, working directly with our Clients to make sure we understand and help them achieve their financial goals. Your previous industry-relevant experience is a vital component to our success.

This is a detail-oriented position that requires the ability to multitask, anticipate needs, and adjust to changing priorities as well as operate as an effective member of a team. Elements of responsibilities include being an excellent listener, staying current in professional knowledge and maintaining appropriate licensing or professional credentials. You will be expected to answer difficult questions from clients, provide a high degree of service and actively grow your business by asking for referrals. You must be able to prioritize telephone calls, emails, daily account maintenance and other administrative support tasks.

You will need to comprehend the details of our investment strategies, our proprietary investment process, investment products and programs, and the asset allocation tools that we use in serving our clients. You will also be responsible for addressing clients' financial planning needs by working with a network of industry professionals covering estate planning, taxes, and insurance.

At Merriman we work as a team, which includes supporting each other and lending a hand. It is not uncommon to utilize your skills and talents in other departments to work on projects and short-term tasks that need assistance.

Details: Normal business office hours are 7 a.m. to 4 p.m. Monday through Friday. You will be expected to work outside of normal business hours occasionally.

### **Qualifications**

Candidates who want to be considered for this job *must* have previous experience providing financial advice in the financial services industry for a minimum of three years. He or she is comfortable dealing with information that is sensitive, personal and confidential. Other essential attributes include accuracy, good judgment, tact, reliability, trustworthiness, professional poise,

excellent communication skills, the ability to work under stress and deal with clients who are under stress.

Our wealth advisors are familiar with financial markets and personal finance issues in general. A Certified Financial Planner CFP® or a personal commitment to attain at least the CFP® designation is required. A CPA and/or CFA designation is desirable.

**Work Environment**

This position works in a high rise office environment. The position requires sitting, standing and mobility throughout the office. Ability to use common office products (phone, fax, PC and related software) is necessary to perform this job. The ability to communicate clearly and professionally is vital to the role of Financial Advisor.

**The rewards**

We offer a team-based, safe, positive work environment where Employees are encouraged to grow into new responsibilities and to accept new challenges. Our pay is competitive, and our benefits include a co-funded retirement plan, medical coverage and much more.

As a result of the environment we strive to create for our staff, our Employee turnover is very low. In the interest of our Employee's health, we are a non-smoking firm.

To apply please visit [www.Merriman.com/jobs](http://www.Merriman.com/jobs) and complete our online application process.

We look forward to hearing from you.