Wealth Advisor

Description:

Candidate must have extensive experience in asset management, financial planning and insurance planning. RIA and independent B/D background preferred. The Wealth Advisor will be responsible for managing and retaining client relationships, closing new business providing financial planning advice, as well as contributing to the firm's goals in a team orientated environment. Mandatory clean compliance history required. Equity ownership may be offered with time.

You will be the lead for a group of client relationships. Responsibilities include directing client meetings, implementing investment strategies, providing proactive service, resolving client questions and monitoring accounts. The Wealth Advisor should have a proven track record developing long-term client relationships. Experience with an array of different investment products; including mutual funds, 529s, variable annuities, closed-end funds and alternative strategies such as REITs, managed futures and structured notes. Knowledgeable about industry trends, the markets and changing laws and regulatory policies. Must have a positive attitude and be able to work within a team environment. Social media familiarity a plus.

Experience Required:

- CERTIFIED FINANCIAL PLANNER or CHARTERED FINANCIAL ANALYST designation required
- Proven track record of closing business, managing client relationships and high customer satisfaction and client retention
- 8+ years direct client service experience
- 8 + years investment management and financial planning experience
- Strong financial technical competence
- Implementation of High Net Worth client solutions including retirement income strategies, tax minimization, insurance planning and portfolio management strategies
- Deliverance and implementation of financial plans
- Bachelor Degree, Finance focus desired
- Computer proficient with Microsoft office applications, Morningstar Workstation (preferred),Financial Profiles (preferred), and eMoney (preferred)
- LPL Financial operational experience a plus or similar independent B/D experience
- RIA experience preferred
- Demonstrate proven fiduciary judgment and ethics
- Media experience a bonus

We offer a complete compensation package, including salary, bonus, 401k, group insurance (medical, dental, vision), bus pass, paid holidays and vacation time.

Please submit your resume plus a cover letter describing your interest, qualifications and salary requirements to: asinclair@mwboone.com