lakeview FINANCIAL

POSITION: **Support Advisor**
REPORTS TO: **Partner/Lead Advisor**
LOCATION: **Seattle, WA**

COMPANY

Lakeview Financial Group, LLC, is a highly regarded and growing financial planning and investment advisory firm in Seattle. We believe that wealth management is a relationship, not a formula. We help every person and family we serve build a unique and evolving financial roadmap, so they can navigate all of life's transitions with confidence and optimism. We value our employees and work to provide a great atmosphere and learning environment reflecting our core values of honesty, integrity, respect for others and ethical treatment.

POSITION

We are seeking an individual with a warm, professional, client-focused demeanor, strong verbal and written communication skills, attention to detail, ability to effectively prioritize and multi-task and contribute in a collaborative, team-oriented atmosphere. This goal-oriented, self-motivated candidate should be familiar with the financial planning and investment management process, and dedicated to helping take our company to the next level.

PRINCIPAL RESPONSIBILITIES

- Support the Advisors and Lead Advisors by preparing reports for client meetings including the performance and financial planning reports.
- Follow-up with clients to gather any missing data needed by the Advisor or Lead Advisor in preparation for a meeting.
- Participate in some client meetings in order to take notes and gather data to input into financial planning and reporting systems.
- Complete the meeting by entering meeting notes, relevant client data and all follow-up related to client meetings.
- Help implement strategies and recommendations using our technology resources: Junxure CRM, MoneyGuidePro, Morningstar Advisor Workstation, Fidelity Institutional Wealth Services.
- Continually develop professional expertise through regular collaboration with Lakeview team members and frequent networking with outside professionals.
- Executing accurate and timely trades in client accounts.

REQUIRED KNOWLEDGE, SKILLS AND ABILITIES

- Excellent communication skills: expected to write to and talk with high net-worth clients and other professionals.
- Beginning knowledge of the financial planning process.
- Beginning knowledge of retirement planning, tax issues, risk management, and estate planning.
- Undergraduate degree required.
- CFP® preferred.
- Experience with Junxure, eMoney and MoneyGuidePro are highly desired but not necessary.
- Attention to detail and quality of output.
- Friendly, responsive and dedicated to client service.
- Strong team player, willing to contribute extra effort to accomplish tasks/goals.

For more information or to submit a resume, contact:

Julie Back, Partner/Lead Advisor
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