NEW PLANNER RECRUITING

Associate Wealth Advisor – Roseville, CA

To apply for this financial planning career position please submit information to candidate@newplannerrecruiting.com or www.newplannerrecruiting.com

What our client is offering:

We're a boutique financial planning practice that works with affluent retirees and thriving entrepreneurs. Our comprehensive and client-centric approach to financial planning is dedicated to helping our clients sustain and benefit from the wealth they've built when work becomes optional.

We are seeking a highly energized, personable and confident individual who will help service and maintain the relationships we have cultivated with our clients. The candidate must be extremely professional in appearance and manner, quick to learn new processes and procedures, and computer savvy.

The associate financial advisor will assist financial advisor(s) in working with clients to help them achieve their financial goals. The employing franchise owner will lead you as you hone your skills and build a base of clients which you service. As an associate financial advisor, you will be instrumental in creating and delivering a unique client experience that defines and differentiates the practice. This position will consistently follow high standards of business and professional ethics and legal and regulatory requirements when dealing with others and/or performing work activities.

What you will get to do:

- Develop and implement annual marketing plan to meet client acquisition goals
- Identify clients to engage or re-engage in planning relationships
- Prepare for client meetings focused on planning discussions and create planning deliverables
- Assist Private Wealth Advisor in analysis of estate plans, retirement plans, tax planning, insurance needs, Social Security income analysis, pension plan analysis, etc.
- Conduct recommendation meetings and reviews with clients and ultimately conduct client review meetings independently
- Coordinate planning recommendations and implementation with outside professionals
- Continuously monitor client's financial situations with detail and accuracy
- Understanding of firm's investment philosophy and build portfolio allocations accordingly

What we seek in a candidate:

- Bachelor's degree in Financial Planning, Finance, or Business Administration
- 3+ years of experience in the financial services industry
- Series 7 & 66 licenses
- CFP® certificant or currently pursuing CFP®

- Solid understanding of comprehensive personal financial planning topics
- State life, accident and health insurance, *preferred*
- Professional business acumen and communication skills

Temperament & Behavior Traits:

- Uses voice and body to effectively communicate, convince or persuade
- Displays personal energy through strong verbal exchanges and body animation
- Excels in impromptu speaking situations
- Communicates powerfully in one-on-one settings
- Views problems as opportunities
- Instills energy and enthusiasm in others
- Seeks total involvement
- Has strong multi-task ability
- Is a forward thinker with the ability to recover quickly from errors and mistakes
- Desires to run with the “current vision” without establishing your own agenda

Motivational Framework:

- Uses practical common-sense thinking
- Seeks knowledge with a desire to know “why”
- Believes there’s “more than one way to skin a cat”
- Desires to explore and present new and exciting ideas
- Desires to own their own space while delivering the desired results outlined by the leadership
- Believes in pulling your own weight without being primed or prodded

Position perks:

- Competitive Base salary plus commission and bonus
- Health benefits
- Wellness Programs
- Employee Assistance Program
- Life Insurance
- Short-Term and Long-Term Disability
- 401k Retirement Savings Plan