Financial Advisor

(Part-Time)

Position Summary:

Rebalance IRA has a part-time Financial Advisor position open that allows for tremendous flexibility for those who are self-motivated and disciplined. Working out of your home office, you will focus on building solid relationships with our clients to help them retire with more. At Rebalance IRA, our Firm combines a low-cost "robo" investment platform with a team of sophisticated and highly credentialed finance professionals. Our Firm reduces client fees by an average of 52% and drives breakthroughs in investment management to benefit clients.

Primary duties and responsibilities:

You will be given a client base for you to advise and support. You will be expected to retain your assigned client base, build greater "share-of-wallet" from them, and attract new clients via referrals. We interact with our clients via phone (no in-person meetings) and email. Using the Salesforce CRM software system, you will:

- Develop investment plans with clients to help them reach their retirement goals.
- Serve as investing coach and provide ad-hoc client support as needed through verbal and written communication.
- Conduct a formal annual review of investment portfolios.
- Comply with the Rebalance IRA methodology and investment guidelines; document and maintain organized client files, which meet department compliance standards.
- Maintain all required licenses and designations.

The Ideal Candidate Should Possess:

- Undergraduate degree or equivalent combination of training and experience.
- Certified Financial Planner designation preferred.
- FINRA Series 7 or 65 licenses (or ability to obtain within 120 days).
- Minimum of three years related financial planning and/or client relationship management experience.
- Excellent writing and verbal communication skills.
- Emotional IQ – ability to work with clients, empathize with their emotions with respect to money, coach them, and convince them not to allow emotions to drive investment decisions.
- Work independently but as a team member, balance multiple responsibilities simultaneously, and demonstrate exceptional time-management skills.
- Experience and high comfort level with online software platforms Salesforce and e-Money, and ability to use Excel.

About Rebalance-IRA

Rebalance IRA is one of America's leading investment firms that is at the forefront of providing consumers with a fundamentally different and better set of retirement investment options: lower costs, "endowment-quality" globally-diversified retirement investment portfolios, and systematic rebalancing. This investment approach is combined with a team of sophisticated and highly credentialed finance professionals who provide advice that is unbiased and focuses on the client's long-term retirement investment goals.

The Firm's Investment Committee is anchored by three of the most respected experts in the finance world: Princeton Economics Professor Burton Malkiel, author of the classic investment book, A Random Walk Down Wall Street; Dr. Charles Ellis, the former longtime chairman of the Yale University Endowment; and Jay Vivian, the former Managing Director of IBM's $100+ billion retirement investment funds for more than 300,000 employees worldwide.

Rebalance IRA's innovative, pro-consumer approach to retirement investing has garnered high profile coverage. The Firm, and its leadership, regularly have been featured in The New York Times, The Wall Street Journal, NPR, Fox, PBS, Forbes, USA Today, CNBC, Nightly Business Review, CBS, The Washington Post, The Economist, and a wide range of other national and local media. Managing Directors Scott Puritz and Mitchell Tuchman are acknowledged industry thought leaders, and Mr. Puritz recently testified before a U.S. Senate Committee evaluating the U.S. Department of Labor's new fiduciary rule.

Rebalance IRA is headquartered in Palo Alto, CA and Bethesda, MD and currently manages over $470 million of client assets. For more information, visit www.rebalance-ira.com. For immediate consideration, please submit your resume to: rsnelling@rebalance-IRA.com .