Associate Wealth Management Advisor
<u>Firm Description</u>: Evans Financial Wealth Management and Insurance Services is a successful wealth management practice associated with a Fortune 500 company providing financial security for over 150 years. Our practice shares a team philosophy and offers flexibility and opportunities for growth. *http://www.mark-evans.com/*

<u>Qualifications:</u> Understanding of investment markets and trades with the ability to process personal securities transactions. Strong critical thinking, financial analysis and problem-solving skills required. Strong organizational, written and verbal negotiation and communication skills are essential. Excellent time management skills. Works well on a team and can effectively delegate to other team members. Ability to adapt to change and work in a fast-paced environment. Goal driven and positive with a solution-based mindset. Has their FINRA Series 7 and CA insurance license. Has or is willing to obtain the CFP designation. Three years in securities industry with experience in advisory programs required. Bachelor's degree in Business or Finance is preferred. Background check is required.

<u>Job Description:</u> Responsible for managing $70 MM book of business. Act on behalf of the employing wealth management advisor to develop and prepare needs-based analysis or financial plans, recommend fund portfolio options and communicate with clients on advisory-related services and products. Monitor industry trends. Specific duties include proposal and case preparation, qualified plan management, portfolio construction, processing accounts, investment service and operations, and advisory client meetings with employing wealth management advisor.
Send resume to: Mark Evans at mark.evans@nm.com