**Wealth Advisor**

**Position Summary**

A Wealth Advisor will establish new client relationships in addition to providing advisory services and support to current clients.

**Essential Job Functions**

* Provide information/education and advice to clients about the purpose and details of financial services, and strategies.
* Source prospective client opportunities by capitalizing on networking and referrals
* Advise established investment models and strategies that are appropriate and suitable for our clients
* Servicing client needs and requirements as determined through client interaction
* Promote the firm’s wealth enhancement and planning services
* Adhere to all company and industry supervisory guidelines and policies
* Participate in daily morning advisor meetings, training, and continuing education requirements.
* Provide positive and professional service to the client base assigned.
* Handle all communication with the client base including phone calls, emails and meetings.
* Review investment products currently held in clients’ accounts, both advisory and brokerage, and reallocate to the appropriate model to help clients meet their financial objectives.
* Maintain all continuing education requirements of a wealth advisor plus required training elements.
* Build and maintain a relationship with the client base with main focus on service and operations and minor focus on acquiring new clients.
* Attend firm client events.

**Knowledge, Skills, and Abilities**

* Business development skills
* Excellent interpersonal & communication skills
* Excellent attitude and an extraordinary client service orientation
* A genuine interest in serving and caring for other people
* Excellent organizational and time management skills
* Ability to handle multiple tasks and priorities simultaneously

**Preferred Education and Experience**

* 5 to 10 or more years of investment advisory experience
* Bachelor's degree or higher strongly preferred
* Active Series 7 license
* Active Series 65 or 66
* Life, Health and LTC Licenses
* Clean U-4 and U-5 history
* Certified Financial Planner (CFP) preferred
* Certified Financial Analyst (CFA) desirable