

Lead Advisor:

A Lead Advisor contributes to the firm's growth by cultivating new prospective client relationships while managing existing client relationships effectively. As a Lead Advisor you are expected to develop different prospecting and networking channels to continue to grow not only your personal client base but increase the firm's presence in our community.

Essential Job Functions for the Lead Advisor include:

- Client relationship development and management, including ongoing and regular client contact and communications
- Lead and direct discovery and review meetings for current and prospective clients
- Solve complicated financial planning, estate, tax, and retirement issues
- Collaborate with Client Manager/planning team regarding client portfolio allocation and Long-Term Projections to develop and implement client specific planning needs
- Organize and direct client priorities and tasks amongst teammates
- Utilize current firm technologies to facilitate prospect and client meetings
- Mentor and train new team members and advisors

Required Knowledge, Skills, and Abilities

- Desire/ability to work successfully in an entrepreneurial environment
- Minimum 3 years' experience in financial advisory services with demonstrated ability to develop, cultivate, and manage different networking opportunities
- History of developing financial plans and manage client relationships
- Bachelor's degree or higher
- Currently hold Series 65 license
- Excellent interpersonal, communication, presentation, and listening skills
- Ability to understand and explain sophisticated financial concepts and issues
- Strong problem-solving skills
- Detail-oriented, accurate, organized, able to set priorities, self-starter
- Financial planning/wealth management acumen, judgment, and experience
- Passionate about doing what is best for clients, acting exclusively in a fiduciary capacity
- Community service driven and charitably minded
- Team player, collaborative, able to work with and through others, proven delegation skills