Ameriprise Financial Advisors
Position Title: Associate Financial Advisor
Location: Richardson, Texas
Requirements: College Degreed & Fully licensed (Series 7, Series 66), 1+ years of experience in front of clients
Key Character Traits: Motivated, Hard Working, Looking For a Long Term Career & Sales Oriented
Contact Information: karmlb57@aim.com Please include your resume.

A well-established wealth management financial advisory firm in Richardson, Texas is seeking an associate financial advisor to join its team. You will help conduct the smooth operation of a fast paced- and friendly-financial planning office. This is an instrumental role in the practice. The employing financial advisor will lead you as you hone your skills and build a base of clients which you service. Once the candidate has been properly trained they will be meeting with clients on their own and seeking to grow their practice within the larger practice. The primary purpose of this position will be to work with existing clients from the lead advisor as well as acquire new clients on their own. 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.

Character Traits:
- High Integrity
- Team Player
- Outgoing
- Process Oriented
- High level of organization as well as attention to detail
- Strong project manager
- Initiative
- Excellent time management skills
- Able to align the direction, service, products and performance of the business with those of the lead advisor's business plan
- Excellent verbal and written communication skills with persuasive ability

Approximate Allocation of Time and Work Required:

Marketing & Client Acquisition > 25%
- Develop & implement annual marketing plan to meet client acquisition goals
- Contact & set meetings
- Coordinate client appreciation events
- Leverage natural market to drive new client acquisition
- Attain client referrals

Financial Planning and Advice > 30%
- Identify clients to engage or re-engage in planning relationships
- Prepare for client meetings focused on planning discussions
- Gather and enter client data into Financial Planning Tool Suite both for yourself and lead advisor
- Create planning deliverables

- Perform case analysis and develop recommendations
- Conduct and /or participate in client meetings to present recommendations
- Track clients progress towards their goals and hold them accountable to them
- Answer questions and provide readily available information to clients, if requested, as it relates to servicing their accounts

Product Solution > 25%
- Assess client’s risk tolerance
- Assess the clients goals and time frame
- Create recommendations that fit clients goals and risk tolerance
- Persuade clients to act upon their suitable recommendations
- Execute appropriate trades that align with proposed portfolio
- Monitor economy, markets and world events to determine any required strategic rebalancing
- Manage wholesaler relationships