

# Associate Financial Advisor - Financial Services Industry

San Angelo, TX

Ameriprise – San Angelo, TX - A well-established financial advisory practice in San Angelo, TX is seeking an associate financial advisor to join its team. This is a full-time role and the key responsibilities include: case analysis, preparing financial planning recommendations, running hypothetical illustrations, preparing visual aids to be used in client meetings, holding client meetings and reviews, and all levels of client service including using financial planning tools and related software. Product knowledge of life insurance, disability and LTC insurance, brokerage & managed accounts, stocks, bonds, ETFs, and mutual funds is preferred but not required.

Key skill sets, traits, competencies and knowledge required for this position include:

- Integrity
- Team player
- Process oriented
- High level of organizational skills as well as attention to detail
- Client Focus - builds and maintains client service and satisfaction via advice, products, education
- Focuses on client's results rather than own
- Strong project manager
- Seeks client feedback and ensures needs have been fully met
- Delivers service, advice, products when and where the client needs them; explores options when unable to deliver on a request and pursues solutions until the client and his/her needs are satisfied
- Business Alignment - aligns the direction, service, products and performance of the business with those of the Advisor's business plan
- Integrates the advisor's direction into every decision and consultation
- Seeks to understand all goals of business
- Advocates for and positively represents other programs and services when working with clients and team members
- Initiative – self Starter and self-motivated
- Strong presentation and interpersonal skills
- Excellent verbal and written communication skills with persuasive ability
- Analytical ability, persistence and an entrepreneurial perspective to build a client base
- Excellent time management

Candidates must have an associate degree or higher – college degree preferred but not required, be fully licensed (Series 7, 66, and Life/Health license) or the ability to get licensed quickly, and looking for a long-term career with our team, as well as have an honest desire to learn and grow.

Please provide a cover letter and resume when applying to [kim.m.kaluza@ampf.com](mailto:kim.m.kaluza@ampf.com)

Compensation \$50K-\$60K based on experience