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Delphinus Financial Advisors, LLC
38 Mechanic St, Ste 202
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ASSOCIATE FINANCIAL ADVISOR

Delphinus Financial Advisors, LLC, is a small but fast growing independent fee-only financial advisory firm based in Foxboro, MA, just south of Boston. We provide comprehensive financial planning, investment management, and tax planning & preparation, as well as support of all-things-financial in our clients' lives. Our success has been achieved through long-term trusted client relationships. Our goal is to become a top-notch, regionally respected firm, and towards this end we are looking to add an Associate Financial Advisor to help take our firm to the next level.

From the first month, the Associate will work closely with both the firm's Owner as well as the firm's Client Service Specialist. With the Owner, the Associate will sit-in on client meetings, and support the pre-meeting preparation and post-meeting follow-up for all client planning, investment, and tax work. With the Client Service Specialist, the Associate will learn, support, and contribute to the tools, systems, and technologies that allow us to provide consistently superior client service. Over time, the Associate will expand their role to take on more direct client communications, with a career path to higher-level advisor roles. The expectation is that the Associate will advance to provide direct client communication with sole client responsibility within 1 – 2 years. Beyond this, for the right person, this is an amazing opportunity to join an early stage firm with a long track record of year-over-year growth, to help shape this growing firm, and to advance and grow along with it. And for this right person, the sky is the limit in career growth, up to and including business management, equity partnership, and succession opportunities.

If you're up for the challenge, and the opportunity, read on.

Candidates must have all of the following characteristics:

- Ability to develop trusted relationships with colleagues, clients, and partners
- Engaging interpersonal skills for working closely with colleagues, clients, and partners
- Solid attention to detail, on all things large and small
- Strong commitment to keeping promises and communicating status along the way
- Capable of receiving constructive feedback, and viewing it as a learning opportunity
- Confident ability to provide constructive feedback, in a way likely to be helpful to others
- Awareness that mistakes happen, yet capable of learning from them to prevent future errors
- Ability to thrive in a small company environment, and willingness to jump in to assist anywhere and everywhere as needed
- Independent self-starter and problem solver, yet goal-oriented team player
- Ability to adeptly handle multiple, changing, and competing projects and priorities
- Excellent verbal and written communication skills
- Proven analytical and mathematical skills
- Dedication to helping others in general, and through financial advice specifically
- Appreciation for the privacy and discretion required in handling client information
- Passion to immediately start and/or complete the CFP(R) designation
- Focus on life-long learning, from the financial technical, business, and self-improvement perspectives

Experience & Education:

- Experience of 0-3 years
- A minimum of a BS degree is required

Position provides:

- Competitive entry-level base salary
- Incentive-based bonus plan
- Retirement plan with company match
- Health insurance with company contribution
- Paid time off (for vacation days, sick days, and personal days)
- Paid company holidays
- Company paid Life, Short-Term, and Long-Term Disability insurances
- Paid professional organization dues, and support for industry continuing education
- Professional mentorship & training, with amazing career growth potential
- An opportunity to learn and grow, while helping our clients achieve their goals

To Apply:

No phone calls, please. Please direct your cover letter and resume to: asalotto@delphinusfa.com. All inquiries will be held in the strictest confidence. For more information about the firm, please visit www.DelphinusFA.com.

Your cover letter should include short answers to the following questions:

- What would you bring to the firm that is unique and special?
- What would you need from the firm to reach your highest potential?
- Why do you want to work for the firm?
- Are you an "A Player", at the top of your game, and a standout amongst your peers? If not, please don't apply. If yes, why do you believe so?

Delphinus Financial Advisors, LLC provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.