



## Financial Advisor- Louisville KY

### WHY IS THIS A GREAT OPPORTUNITY?

Successful, growing fee-only Financial Planning firm that has been providing advice and helping clients for over 20 years is adding to their dynamic, collaborative team! This is an exciting opportunity to be part of a new location for this Ohio-based RIA firm. We have been retained to help them find the right Advisor who wants to team up with a firm where he/she can truly grow and be part of an organization whose culture and values are driven by putting their clients' needs and goals first!

This firm has a strong marketing program that generates large numbers of prospective clients from a variety of media and other sources. An existing book of transferrable business, while acceptable, is not mandatory. Financial Advisors with an existing book of business who are open to acquisition will be handled accordingly.

Our client offers a competitive salary, performance incentives and benefit package including paid vacation and time off, 401(k) and life, health, dental and vision insurance.

### **Responsibilities** (include but are not limited to)

The objective of this position is to serve as a guide for clients on their journey toward a secure financial future.

- Learn about clients life and goals and prepare a clear total financial picture
- Make adjustments accordingly as clients' situations or market conditions change
- Maintain current knowledge of financial planning industry and economic developments

### **Qualifications**

- Four-year degree in finance, economics, business or related discipline
- Minimum 3 years' experience as financial advisor
- CFP designation or ability to obtain in an agreed upon period of time
- Passionate about the planning process
- Skilled in building and maintaining client relationships
- Team player

This firm offers a competitive salary and benefits package, including paid vacation, 401(k) retirement plan and health insurance.

**For further information please contact: Mitch Vigeveno, President, Turning Point Inc.**  
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