Your goals are our top priority. At Majors & Mondragon, LLC, our experienced advisors strive to strengthen all areas of your financial life. Working as a collective, we unite our individual expertise to grow and protect what you’ve worked so hard to build. Our team consists of designated CFPs® (Certified Financial Planner™), RICPs® (Retirement Income Certified Professional), and CLUs® (Chartered Life Underwriter). Through state of the art technology, our expert advisors can help you live the life you’ve always desired.

Job Description: Financial Advisor Associate

Recommend investment products and services that are suitable for prospects and clients based on their objectives, resources, time horizon, risk profile, and preferences.
Execute and negotiate follow through of implementation life insurance, investments, tax planning, debt management, estate planning, and other tasks quoted to client.
Decide how to build your practice by choosing your clients and the markets you want to pursue.
Solicit clients actively via telephone, mail, referrals, etc.
Maintain proper documentation following preset guidelines established by compliance and management.
Comply with all industry rules and regulations.
Well organized with the ability to manage time effectively while managing multiple priorities.
Ability to influence people.
Possess a commitment to professionalism, honesty and a strong work ethic.
Has demonstrated the ability to ask for the appointment, qualify for opportunity and close business within 2 to 3 calls.
Work independently as well as function as part of a team.
You may also need certain soft skills, personal characteristics that you cannot learn through formal training, to succeed in this occupation. Here are the most important ones:

Active Listening: You must be able to listen to and understand your clients' financial goals.
Critical Thinking: To figure out how to help your clients meet their goals, you need to evaluate all the data available.
Reading Comprehension: It is necessary to understand documents that describe various financial instruments.
Verbal Communication: You must be able to clearly explain the financial services you can provide to potential clients.
Service Orientation: A desire to help people plan for the futures is important.
Compensation: base salary, plus generous commission structure. unlimited earning potential. expense accounts. iPad, Apple Pencil. bonuses provided.

Benefits:
401K contribution up to 3%.
Pension Plan.
Profit Sharing .
Medical Benefits (Health, Dental, Vision).
Yearly company paid training sessions.
Mentoring program (1-2 years).
Pathway to Partnership.
Cutting edge technology/software for increased efficiency.
Lead Program Initiative

Please submit your resume on Careers@MajorsMondragon.com