The Opportunity

Mesirow Financial is an independent, employee-owned, diversified financial services firm, headquartered in Chicago and founded in 1937. As specialists in investment, risk management and advisory services, we are committed to helping institutional, corporate, and individual clients achieve their objectives. Our professionals are inspired by an entrepreneurial desire to develop tailored solutions that deliver measurable results.

Mesirow Wealth Advisors is part of Mesirow Financial. Mesirow Wealth Advisors understands the challenges and pressures that individuals and families face when trying to manage their personal wealth, throughout the many stages and events of a lifetime. We partner with them to understand goals, and then together we develop a plan to accumulate, grow, protect and distribute their wealth as planned. We are seeking a highly-motivated Wealth Specialist in our Highland Park office to provide financial planning and technical support to clientele.

Responsibilities

- Develop an understanding of Mesirow Wealth Advisors investment strategy and familiarity with fund managers used to execute that strategy
- Analyze financial information obtained from clients to determine strategies for meeting clients' financial objectives
- Working closely with advisors, implement comprehensive financial planning solutions (including asset management, estate planning and risk management)
- Prepare cash flow, retirement planning and other financial planning reports that are consistent amongst the Mesirow Wealth Advisory teams
- Prepare for client meetings and conduct the necessary follow-up to client meetings
- Perform securities transactions upon obtaining appropriate licensing
- Address client needs through incoming phone calls and emails; determining when it is appropriate to elevate any issue or request to an advisor or team leaders
- Maintain and update appropriate due diligence files on securities
- Act as the client technology liaison (e.g., assist clients in utilizing their online portal)
- Participate in Wealth Specialist Committee to collaborate and create a menu/library of services and tools for Mesirow Wealth Advisory teams
- Assist the Client Service Manager as needed to perform administrative tasks and to act as back up to the CSM when necessary
- Meet with existing professional network to expand capabilities
- Perform other responsibilities and special projects as assigned

Requirements

- Strong academic background with a Bachelor's degree in Finance or similar major
- Series 7 & Series 66 (or 63/65) Licensed or able to obtain within three months
- CFP® certified or successfully complete CFP® certification within 12 months of start date
- Become fully proficient in using Black Diamond performance reporting, Salesforce, Microsoft Office Suite, Zephyr Analytics, Wealthscape, eMoney, and additional software tools as needed
- Mid/advanced skill level of Microsoft Excel (data entry, formula manipulation, layout/design)
- Exceptional organization, research and time management skills, and attention to detail
- Strong professional communication skills, both written and verbal
- Effective project management skills
- Highly motivated self-starter with a strong work ethic, positive "can-do" attitude who is energized by the process of identifying prospective clients and closing new business
- Ability to work in a team environment
- Strong desire for business development; has contacts and networking capability