Associate Financial Advisor – Overland Park, KS

We are a well-established Registered Investment Advisor (RIA) firm that is expanding. We offer a great team environment, a reputation for excellence, established clients and excellent growth potential to help you reach your personal and career goals.

Our firm is completely independent, so our loyalty belongs to our clients. We work to provide a great atmosphere and learning environment, and our employees are as important as our clients. We value our employees and we take pride in recognizing their outstanding talents and efforts. We are committed to the delivery of superior quality of services based on a foundation of honesty, integrity and ethical treatment.

We are currently seeking an **Associate Financial Advisor** who is familiar with the financial planning and investment management process and is dedicated to helping take our firm to the next level. This position requires a goal-oriented, self-motivated and professional person. All candidates should demonstrate a desire to network, build relationships and communicate effectively with people.

General Responsibilities:

- Participate in client meetings with Lead/Senior Advisors to ensure the quality and integrity of the client financial plan
- Prepare and make recommendations for client financial plans, including entering data and running reports using financial planning software
- Act as a backup for Lead Advisor on advisory questions from clients
- Assist advisory team with client communications such as writing commentary and economic reports
- Assist advisory team in gathering investment data and research on unique client holdings and/or stock options
- Work with clients and advisory team to analyze, research and make sophisticated recommendations on complex financial situations
- Create initial plans for new clients and update client financial plans annually
- Demonstrate excellent people skills by being confident in the delivery of advice to clients via conference call or face-to-face meetings—excellent verbal and non-verbal communication a necessity
- Always maintain high ethical standards/confidentiality
- Continuously monitor clients' financial situations with detail and accuracy with the ability to the look at the big strategic financial picture
- Dedicated to networking, continued education and establishing relationships with strategic partners in our community
- Rebalancing and making trades in client accounts as directed by advisory team

Qualifications:

- Bachelor's degree (in Finance or related field)
- CFP designation or currently working towards completion
- A minimum of 1-3 years of investment management or financial planning experience
- Excellent knowledge of and experience in the securities industry, regulations, financial planning and investment management
- Knowledge in financial planning software such as MoneyGuidePro or eMoney
- Strong verbal and written communication skills along with attention to detail
- Comfortable writing for publications and presenting webinars/educational seminars
- Strong persuasive and interpersonal skills
- Ability to identify, meet and follow through with client's needs and requirements
- Must be a self-starter and a problem solver
- Must interact effectively with office staff and be a goal-oriented team player
- Must demonstrate excellence in organizational and time management skills
- Be able to meet deadlines and manage the stress of market fluctuations

Benefits:

- Competitive compensation structure (salary and bonus)
- Equity ownership track for employees who demonstrate hard work and leadership characteristics and support the long-term goals of our firm
- Health insurance reimbursement
- 401(K) retirement plan
- Paid holidays and vacation
- Mentorship and learning opportunities
- Paid membership fees for industry associations, conference attendance, and continuing education workshops
- Great working environment with professional growth opportunities

You will be a member of a collaborative and supportive team of strong individuals, all working hard to help us grow a successful, multigenerational firm. To learn more about our team please visit our website at www.integrity-advisory.com.

If you are interested in this position and you are ready to join our team, please email your resume to Jill Green, Director of Operations, at jgreen@integrity-advisory.com