



Announcing an exciting opportunity to join Aviation Retirement Strategies, LLC, a leading independent financial services firm, providing a total wealth management approach for professional pilots, successful aviation companies, and the general aviation community on a nationwide scale. Our clients are affluent individuals, seeking private wealth management with exceptional service, individualized, and custom tailored to fit their needs. Our total wealth management approach includes Comprehensive Financial Planning, Investment Management and Consulting, Retirement Planning, Estate Planning, College Funding Plans, and Risk Management Strategies to include but not limited to Life, Disability and Long Term Care insurance.

There is an immediate opening for a new team member. The successful applicant will be working with the executive team and interacting with existing clients and new business with room to expand role.

Initial Responsibilities include but are not limited to:

- ✈ Facilitating exceptional service experience for clients
- ✈ Assisting in the preparation and follow up for client meetings
- ✈ Facilitating all daily client service activities
- ✈ Cultivating and expanding existing business client relationships through verbal and written communications
- ✈ Maintaining and updating tasks/processes as well as client files and notes
- ✈ Ensure efficient transfer of all incoming/outgoing funds
- ✈ Process all new and current accounts
- ✈ Coordinating all company events, workshops and other programs
- ✈ Maintain administrative procedures and client files FINRA compliant
- ✈ Ensure that Advisor licensing is current for all aspects of business being conducted
- ✈ Making travel arrangements

Requirements:

- ✈ 4 Year College Degree Highly Preferred
- ✈ Good office manner and excellent written/oral communication skills are essential; the position requires the drafting of letters and working with clients/prospects over the phone
- ✈ The ideal candidate is an experienced, reliable individual with strong organizational skills, is able to prioritize and manage their work, multi-task, think on their feet and possess the flexibility to adapt to changing circumstances
- ✈ Ability to independently follow through on all tasks and projects-until they are completely resolved
- ✈ Ability to work under pressure and meet deadlines as work load demands
- ✈ Ability to handle client concerns effectively, courteously and with compassion
- ✈ Ability to create/edit marketing material in Adobe Illustrator, Photoshop, etc. a plus
- ✈ Strong knowledge of MS Office, especially Word, Excel and Outlook
- ✈ Knowledge of the Aviation Industry will also receive strong consideration as well as experience in the financial services and/or customer service industry
- ✈ Knowledge of compliance issues for FINRA and SEC a plus
- ✈ Able to accept responsibility for all areas of administration, secretarial and computer support

Salary/Benefits:

Salary will be commensurate with experience along with a bonus structure. Offices Located at Houston Intercontinental Airport.

Submit resume and brief narrative as to why you think you would be a good candidate to join our team to:

info@pilotmoney.com