



Charles R. Green & Associates, Inc.  
Fort Worth, TX  
Contact Deana Butler with resume at [invest@charlesrgreen.com](mailto:invest@charlesrgreen.com)

## **Position Description: Advisor Associate**

Successful high producing financial planning firm built on personal service is seeking a qualified representative to learn and grow our business. Position includes cultivating referrals and managing existing clients while overseeing and implementing our marketing plan. Candidate must be friendly, professional and able to work with a conservative client base.

### **Responsibilities**

- Anticipating Managing Partner's needs and handling them proactively
- Scheduling client and prospect meetings
- Planning all scheduled marketing activities
- Generating referrals and new clients to meet company goals
- Developing strong relationships and networking
- Maintaining highest ethical standards and company values at all times

### **Requirements**

- Previous experience in the Financial Industry
- Bachelor's degree and Series 7 required.
- Having or ability to study for CFP (Certified Financial Planner) designation.
- Positive (Can do) attitude and strong work ethic!
- Strong communication and marketing skills
- The ability to work one on one with clients
- An entrepreneurial work ethic and desire to achieve success
- Detail oriented - excellent phone skills, presentation, time management
- Reliable and willingness to work until task is complete
- Assertive, self-starter
- Strong computer skills, specifically MS Office including PowerPoint and Publisher
- Must comply and adhere to all industry rules and regulations