

## **PAX FINANCIAL GROUP: ASSOCIATE ADVISOR REQUISITION**

### **Overview**

PAX Financial Group is seeking an Associate Advisor. This position requires an internal 6–8+ month AA candidacy training through our Service Department. The purpose of the Associate Advisor role is to equip and train a future Financial Advisor with the skills, resources, contacts, and experiences necessary to have a uniquely positive impact on client relationships through the practices of financial planning and investment management.

The Associate will be provided with leads on a regular basis. The Associate will also be assigned clients to ensure they learn from real-world advisory situations which include real challenges for real clients. In all of this, the Associate will be provided with coaching and dedicated mentoring.

The Associate is eligible to receive an invitation for promotion to Financial Advisor when sufficient progress towards mastery has been made in the areas of Relationship Management, Consultative Selling, Technical Competencies, Firm Practices and Business Management.

### **Essential Job Functions**

- Coordinate, partner and collaborate with Client Services team
- Support designated Financial Advisor in client preparations
- Engage in teamwork and integrate into the PAX culture
- Perform necessary analysis for client onboarding and Financial Checkups
- Create custom analyses of financial decisions
- Prepare presentations and other materials necessary for client meetings
- Perform research of investments that clients currently hold or may hold
- Answer routine client questions and service requests

### **Competencies**

- Excellent written and verbal communication skills
- Detail oriented; someone who pays attention to the small stuff
- Critical thinking skills to conceptualize the often-ambiguous nature of working with intangibles
- Problem solving skills
- High level appreciation for the confidentiality required of working with other people's money
- High level customer service skills to prioritize the needs of clients
- Team player who does not hesitate to help another even when it is inconvenient
- Responsible to work efficiently and effectively without being told
- Integrity to be trusted to do the right thing even when no one is watching

### **Minimum Candidate Qualities**

- 4-year college degree from an accredited university
- Series 65 and/or CFP® preferred
- Strong business, economic and investment acumen
- Strong verbal, written and interpersonal communication skills
- Strong technology aptitude and ability to manage multiple priorities
- Ability and patience to listen with empathy
- Ability to thrive in a highly collaborative environment
- Current authorization to work within the US

### **PAX Financial Group Offers**

- Sponsorship of industry licensing and credentialing
- Administrative, marketing, trade execution, and financial planning support for advisors
- State of the art tools in CRM, planning software and behavioral finance
- Company-sponsored employee events
- Paid Time Off
- Comprehensive health benefits package
- Defined Contribution retirement package
- A warm, welcoming culture built on teamwork, trust and encouragement of one another

### **About PAX Financial Group**

- Started in 2007 by three Texas industry veterans
- Widely recognized by [independent companies](#) for rapid growth and employee satisfaction
- Dave Ramsey SmartVestor Pro provider
- *Awards worth mentioning:*
  - Inc 5000, 3 consecutive years
  - Best Places to WORK, 8 consecutive years
  - Fast Track
  - TINY PULSE: Happiest Company Award
  - Advisory HQ: Best Financial Advisors in San Antonio
- Investment recommendations are made by an internal investment committee or designated subadvisor
- Custody through TD Ameritrade with SIPC on all accounts
- PAX advisors are compensated by salary plus incentives
- PAX advisors are independent advisors and do not offer clients proprietary products

### **About our CEO, Darryl Lyons**

- Author of three books
  - [Small Business Big Pressure](#): A Faith Based Approach to Guide the Ambitious Entrepreneur
  - [18 to 80](#): A Simple and Practical Guide to Money and Retirement for all Ages
  - [The Grand Money Chasm](#): Ten Effective Strategies to Build A Money Legacy Within Your Grandchildren
- Serves on Dave Ramsey's exclusive Investment Council
- Received naming honor by San Antonio Mayor Julian Castro for "[Darryl W. Lyons Park](#)"
- Guest writer for San Antonio Business Journal, San Antonio Express News, and Forbes.com

### **For serious inquires please contact:**

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