

RECRUITER



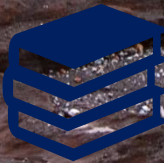
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INTERESTED?

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Houma, LA

Associate Wealth Advisor

NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing an independent RIA in Houma, LA that is seeking an Associate Wealth Advisor to join their team. Detailed job specifications available once we connect and agree it is a mutual fit.

GROWING, CLIENT-CENTRIC RIA.

Our client is a family-owned, independent RIA firm located in Houma, LA, and serving clients across the Gulf Coast of Louisiana. Their mission is to provide clarity, strategy, and accountability to the financial lives of their clients. This is the perfect opportunity for the professional seeking an opportunity to step into the driver's seat and make an immediate impact on clients. With experienced mentors and a tech stack that includes Orion, Salesforce, and eMoney, you'll have all the tools you need to deliver elite financial planning advice.

RESPONSIBILITIES WE'LL TRUST YOU WITH

Services and delivers financial planning to the client base, focusing on areas such as cash flow, retirement planning, estate planning, education planning, and major purchase planning. Maintain proficiency with financial planning technology and prepare annual reviews for clients. Develops a close, long-term relationship with clients to understand their current circumstances and future needs or wishes. Follows up on firm-generated leads. Nurture, grow, and proactively communicate with the clients that will be passed to you.

QUALIFICATIONS

Bachelors' degree from an accredited university. CFP® designation preferred. RIA experience preferred. Above average comfort with Fin Tech and the MS Suite. Must possess a servant's heart and a strong desire to succeed. Demonstrated curiosity and confidence when dealing with clients and complex problems. Excellent time management, organizational, and interpersonal skills. Positive attitude and acute attention to detail. Strong technical aptitude with a passion for learning.

THE PERKS

Competitive salary based on experience. Career track available. Opportunity to have client relationships passed to you. Company paid life and disability insurance. 401(k) plan with employer match. Professional development sponsorship available. Mentorship and learning opportunities. Paid vacation and the opportunity to work in a beautiful setting.