FJY FINANCIAL

Position Description: Associate Financial Advisor
Location: Midland, TX

Job Summary:

The Associate Financial Advisor is an advisor/support position that provides technical support for all Financial Advisors. Responsibilities include data gathering and analysis, development of financial planning recommendations, implementation, and portfolio management. The Associate Financial Advisor will participate in client meetings, but not in an advice delivering capacity. In addition, this position has limited decision-making authority on client matters. Associate Financial Advisors may also participate in developing investment and financial planning strategies as part of the firm's Investment Committee and Financial Planning Committee.

Duties and Responsibilities:

Associate Financial Advisors can expect to focus their work in the following areas:

- Client relationship management for clients, including ongoing and regular client contact and communications
- Client service, including client meeting preparation, portfolio changes and reviews, information data gathering, implementation of recommendations, and correspondence and reporting
- Comprehensive financial planning including coordination of asset management, estate planning, and risk management
- Client asset management, including coordination of complete financial planning and wealth management (analysis, estate planning, tax strategies for assets under management, and portfolio management)
- Client and team meetings, as required; special projects, as appropriate; backup for Operations Associate, as needed

Qualifications:

The Associate Financial Advisor position typically requires the following qualifications:

- Self-confidence, personal integrity, and an understanding of fiduciary responsibility
- Ability to multi-task, manage time effectively, and prioritize
- A team player, with strong leadership skills
- Desire/ability to work successfully in a small company environment where it is expected that you will wear many hats with varied responsibilities
- Bachelor's Degree from an accredited college or university (required), Master's Degree a plus;
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as experience with financial planning, client relationship management (CRM) and portfolio management (PM) software
- Excellent written and oral communication skills and listening skills
- Detail-oriented focus and a professional demeanor

Salary and Benefits:

Pay/benefits are competitive based on industry standards.

This position qualifies for the CFP Board Apprenticeship Pathway to certification (i.e. 2 years of experience).

About FJY Financial:

We are a fee-only financial planning and investment management firm with offices in Reston, Virginia and Midland, Texas. Collectively, the principals have been providing financial and investment services for more than 65 years. The Firm's mission is to provide every client with the highest level of individualized service our profession has to offer. We customize our advice to each client, providing them with recommendations and implementation assistance to meet their specific goals and needs.

The Firm currently manages approximately $715 million in assets. Our clients consist of professionals, retirees, corporate executives, business owners, associations, and qualified retirement plans. The Firm's continued growth is primarily due to referrals from its existing client base.

This position provides an excellent opportunity for growth in the financial planning profession. The firm strives to offer a rewarding career path, while providing valuable experience in areas of financial planning, such as cash flow and retirement planning, investment management, income tax planning, estate planning, insurance and risk management, and education planning.

Please submit resumes and cover letters to careers@fjyfinancial.com.

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