**Wage / Salary**

55,000-65,000

Full-Time

### Job Description

Step into an instrumental role. Help conduct the smooth operation of a fast-paced—and friendly—financial planning office. Work as an employee of an independent advisor franchisee with a financial advisory practice of Ameriprise Financial. Assist financial advisor(s) and associate financial advisor(s) in managing and organizing office work flow with an emphasis on creating and delivering a unique client experience that defines and differentiates the practice. This position will consistently follow high standards of business and professional ethics and legal and regulatory requirements when dealing with others and/or performing work activities.

Responsibilities and Time Allocation – Will change over time to meet the needs of the practice and can include other duties as assigned by the advisor.

**Position Functions:**

• Prepare preliminary financial planning recommendations and initial product solutions for advisor review and use in client meetings

• Develop portfolio/robust product solution recommendations that will fit the client’s risk tolerance and time frame as well as develop appropriate product deliverables

• Maintain client contact during the financial planning process. Answer questions and provide readily available information to clients, if requested and as allowable, as it relates to servicing their accounts

• Review and update client information as needed for client review meetings. Attend and participate in client meetings if necessary.

• Manage and resolve client service problems

• Assess the client’s risk tolerance

• Assess the client’s goals and time frame

• Recommend portfolio/robust product solution that will fit the client’s risk tolerance, goals and time frame

• Run illustrations and hypotheticals

• Execute appropriate trades to align with proposed portfolio

• Monitor economy, markets, and world events to determine any required strategic rebalancing • Manage wholesaler relationships

• Conduct transactions on behalf of clients

**Education and other designations**

: • College degree or higher • Already have or be able to study for and pass exams for federal and state licenses and registrations for securities, including Series 7, Series 66, and State life, accident and health insurance license

\*\* We are located south of Houston in Webster, TX.

### Job Dates

**Application Begins On**

02/13/2023, 9:00am CST

**Application Deadline**

12/31/2023, 1:00pm CST

**Anticipated Job Start Date**

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**How do you plan on reviewing your applicants?**

I will review applicants as they come in, and may close the job posting early

### Application Information

**Application Method(s)**

* Apply via This Site
* Apply via Email:susan.e.richards@ampf.com

**Application Documents**

Resume (Required)

Cover Letter (Optional)

Other (Optional)

### Applicant Notifications

**Notify primary job contact of new applications**

Yes

**Notify primary job contact with application packet at the job posting deadline**

No

### Primary Job Contact

**Contact**

Susan Richards

Chief Operating Officer

susan.e.richards@ampf.com

281-724-9612

711 W. Bay Area Blvd., Ste 500, Webster - TX, United States (USA), 77598

### Eligibility

The criteria below determines who can view and apply.

**Student Group**

Current Students, Alumni

**Degree Level**

Bachelor's, Master's, Doctorate, Certificate

**Major/Academic Program**

Finance Investments