



February 9, 2022

We are a registered investment advisory firm based in Dallas, TX offering comprehensive financial planning and asset management services. We are seeking Financial Planners to join the Lindus Advisors team. We are willing to consider experienced planners as well as those new to the industry. We have full-time and part-time opportunities available.

Responsibilities:

As a Financial Planner, you will be primarily responsible for:

- Creating and updating comprehensive financial plans, to include: creating financial planning scenarios in eMoney software, assisting with implementing client recommendations, and producing an organized financial plan with accuracy and attention to detail.
- Supporting the company's client meeting philosophy and directing the financial planning meetings with clients.
- Will be responsible for hands-on research in multiple areas; ongoing learning and development is expected to be applied in providing an exceptional client experience.
- Keeping up with all paperwork and investment related compliance procedures, reporting, and tasks.
- Developing strong relationships with existing clients and providing world class customer service.
- Maintaining the highest level of confidentiality and discretion in all client dealings and with LAI staff.
- To be an ambassador on behalf of the company with client and prospects; promoting the LAI brand.
- Coordinate with team members regarding portfolio management, estate planning, and risk management strategies.
- Being a team player regarding the administration and operation of the business.
- Not the focus of the role, but credit will be given for new client acquisition.

Compensation:

You will be paid a base annual salary depending on experience. In addition, our bonus structure provides additional compensation based on company, team, and individual performance metrics.

If you are interested, please reach out to Peyton McClure at admin@lindusadvisors.com. Please provide your resume and a cover letter describing your professional history and career aspirations.