



At Opes One Advisors, we are looking for talented people who want to take control of their career future. We offer the freedom to run your own financial services practice with the support of a Fortune 300 Company behind you. If you have the desire to be directly rewarded for your efforts, make a difference in people's lives and be in a field that offers ongoing learning, you should explore the Financial Representative opportunity. It could be the best career decision you ever make.

Job Requirements:

To be successful in the Financial Representative Career involves many diverse skill sets. Most importantly you are a business owner and will need to develop your clientele with the training and support from our local agency and corporate offices. Four key personality traits are commonly seen in most Top Financial Representatives:

- **Entrepreneurial Spirit:** The desire to run their own business and the autonomy this provides.
- **Impact on Others:** The belief and focus to do something greater than themselves and help clients realize their financial goals and dreams.
- **Work Ethic:** Top Financial Representatives are self-motivated to learn and market their practice to grow a clientele particularly in the initial years.
- **Coachable:** The ability to work with our managers and mentors to learn the financial knowledge and approaches required for success and reach a mastery level as a planner.

Job Responsibilities:

- Provide sound financial recommendations to help insure financial security for clients, and possess the capability to move clients to take action and implement recommendations
- Act as an advocate for your clients; commitment to enhance, enrich and serve client base
- Implement cutting edge financial strategies to grow and develop long lasting, value based client relationships
- Professional Growth: Commitment to engage in a career long process of ongoing training and education to acquire the knowledge of financial products and services in changing economic conditions
- Expand a business practice by use of effective prospecting and referral based strategies, as well as identifying and cultivating new client relationships within target markets
- Learn necessary selling skills practices



Education and Experience:

- Entrepreneurial minded with a strong work ethic
- Desire to help others manage and achieve financial security
- Highest level of integrity and ethics
- Above average communication skills
- Strong interpersonal and relationship building skills with a focus in identifying opportunities and developing strategies
- Basic computer skills
- Affinity for education and professional development
- Goal oriented with a commitment to personal growth
- Willingness to obtain recognized industry professional designations as a commitment to excellence
- Have or will obtain a Series 6 or 7, and 63 as well as State Life and Health Licenses

For more information on the many advantages of working with us, please contact:

Kelsey Lloyd, Director of Strategic Recruiting

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