ASSOCIATE FINANCIAL ADVISOR

DESCRIPTION

As an Associate Advisor, you will play a crucial support role in a premier fee-only Financial Planning & Registered Investment Advisory (RIA) Firm serving Dentists in the Pacific Northwest. Supporting the lead advisor in serving clients and ensuring retention will facilitate growth and opportunity. As fiduciaries sworn to act in our clients' best interest, we are committed to helping our clients live their ideal lives by aligning their financial resources with their life goals. Working in a beautiful office in Snoqualmie (right off I-90, 25 miles East of Seattle), candidates must have a thorough knowledge of the financial services industry, strong relationship management skills, work with the highest integrity and must be reliable, organized and work well in a self-directed and collaborative environment. If you desire to join a team of professionals committed to superb customer service and strategic growth and you value trust, vision, relationships, experience, service, communication and technology, we want to work with you!

RESPONSIBILITIES

- Support the lead advisor in all areas of the client relationship.
- Responsible for data management of client information & support Financial Advisor(s) in onboarding and maintenance of client relationships including processing investment paperwork, communicating with clients and the investment custodian.
- Participate in client meetings to develop client acquisition skills and to support the conversion of prospects to clients.
- Prepare for and assist with client review meetings.
- Develop & maintain standardized proposals, presentations and resource library.
- Participate in regular team meetings and annual business planning strategy sessions as requested.
- Maintain strong compliance documentation related to research and trading.
- Additional responsibilities as assigned to facilitate growth and opportunity.

QUALIFICATIONS

1. Knowledge of key financial, investment and risk management concepts.
2. A passion for serving clients with the ability to solve problems and anticipate client needs.
3. Able to lead review meetings with existing clients.
4. Superb people skills, excellent verbal and written communication skills, especially the ability to listen and empathize with clients. A team player who is highly flexible, collaborative, responsive and proactively engaged in building relationships.
5. Comfortable with presentations and telephone conversations.
6. Highly organized, process-oriented and accurate, with the ability to follow through and maintain close attention to detail.
7. Reliable, follows through on commitments with time management skills and ability to work with little supervision and the ability to handle multiple tasks and operate on tight timelines.
8. Ability to see the big picture and handle details.
9. Excellent computer skills: (Proficiency in Word, Excel, Outlook and CRM software and extremely comfortable with technology.
10. Dedicated to highest integrity and maintaining confidential information.

EDUCATION & EXPERIENCE

- Background & experience in financial services industry.
- Five to seven years of advice and relationship management experience.
- Licenses & credentials: Series 7, 63, 66, CFP® preferred.

- Knowledge of current Office 365 applications is required.
- An undergraduate degree in business, economics or equivalent work experience with background in financial planning and/or financial services industry is required.

Company Overview

Financial Freedom for Dentists LLC provides comprehensive fee-only financial planning and investment management for Dentists and their partners. We empower clients to reach their goals of financial freedom using an investment management philosophy based on academic research and evidence-based results.

Our Vision

Founded by Nathan Ricks, a Certified Financial Planner™ Professional with over 20 years of industry experience, and a member of the Financial Planning Association (FPA) and the National Association of Personal Financial Advisors (NAPFA), we serve dentists all over the Pacific Northwest.

We empower our clients to live their vision.
We develop extremely strong relationships of trust with our clients
by deeply understanding their hopes, dreams and concerns.
We empower them to live their ideal lives by helping them align their financial resources with their life goals.
We then give them the best financial planning advice in their situation to reach their financial goals.
We monitor the status of their goals with them on a regular basis.
Through the entire process, we provide exceptional customer service.

Compensation & Benefits

- **Hours:** Full-Time, with the option of flexible hours to ensure work/life balance.
- **Pay:** Competitive and dependent on experience. Includes bonus & incentive potential & paid vacations.
- **Benefits:** Health Insurance & Paid Time Off, mentorship & career growth opportunities.

Interested in Applying?

Please submit your resume & cover letter and at least two references to

Apply@Freedom4Dentists.com

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