

Reed & Modawell, LLC

We are looking to add a new member to our team of investment professionals; the applicant must have a strong work ethic and a personality to work with others, both peers and clients. The position will learn from the ground up, with the ability to work independently while embracing team collaboration. Our investment practice consists of two advisors along with two assistants. Dennis Reed, who established the investment practice over 30 years ago, is also a CPA and Lance Modawell; prior to joining our firm 6 years ago, was previously with Edward Jones for 10 years. We offer a wide variety of services to include: long term investing, insurance, tax, charitable giving and estate planning. We feel offering a diverse array of services gives our firm an advantage over our competition. We have a stellar reputation with our clients and our growth is primarily from referrals.

Job Description:

- Preparing for client meetings and reviews; to include the use of financial planning software to enter client data, creating scenarios and reports
- Research related to investment products and modeling
- Maintaining thorough notes regarding client meetings and preparation of account paperwork
- Interfacing with team members, clients, broker-dealer firm, mutual fund and insurance companies
- Building client relationships to gain their trust and confidence in the firm as a whole
- A shared responsibility regarding regulatory issues

Job qualifications required:

- Bachelors or Master degree in Personal Financial Planning
- A strong work ethic, attention to detail and excellent communication skills
- Technology skills in today's current environment

Interview Process:

- Send your resume and cover letter to reedd@myavantax.com or by mail to 3140 Executive Drive, San Angelo, TX 76904.
- A telephone interview
- In person interview with team members

Fingerprinting and a background check is required in the financial services industry.