**Firm**: **Rockgate Financial Partners**

**The Role: Associate Financial Advisor**

We are currently seeking Associate Financial Advisor’s to help take our local firm to the next level. The primary responsibilities will be collaborating with our experienced advisors to maintain profitable, professional client relationships with our current client base, and review/present client related financial plan recommendations or implementation processes with all existing clients. All candidates should demonstrate a desire to network, build relationships and communicate effectively with people. This is a great opportunity for an aspiring advisor to shadow the firm owner, be involved in client meetings early on, and contribute to a growing firm that leverages technology and is positioned for growth. Potential opportunities for acquisition and/or succession plans may exist in certain situations.

**Responsibilities:**

* Work with clients to analyze, research, and implement solutions in their individual financial situations.
* Conduct financial analysis; prepare financial plans and other deliverables for client meetings
* Prepare, coordinate and follow through on any needed communication or implementation of recommendations with new or existing clients
* Demonstrate excellent people skills by being confident in the delivery of financial advice to clients via conference call and face-to-face meetings.
* Maintain high ethical standards and confidentiality at all times.
* Continuously monitor client’s financial situations with detail and accuracy with the ability to look at the big strategic financial picture.
* Dedicated to networking, continued education and establishing expert relationships with strategic partners in our community.

**Education/Licenses:**

The ideal candidate will have at minimum an undergraduate degree.  The following licenses/designations are preferred:

* Life and Health License and FINRA Series 6/7 and 65/66.
* Willingness to pursue CFP® designation or other industry noted designations to show ongoing continuing education within our industry.

**Skills/Experience:**

* Entry level position in financial services industry
* Self-motivated and ability to establish effective relationships with diverse personalities
* Understanding of financial products including insurance and investments
* Excellent Communication skills along with the ability to expertly multi task
* Strong Organization and Customer service skills required
* Extensive Microsoft Office skills with intermediate or better computer skills

Please submit your resumes to Asynder@rockgatefinanical.com or if you would like to get more information on this position contact Matt Minshew at 972-759-3944.