



SERVICE - INVESTMENT ADVISOR REPRESENTATIVE

Summary: Marmo Financial Group, LLC. (MFG) seeks a highly energized and confident individual who will thrive in a busy environment to serve as a Service-Investment Advisor Representative. Candidate must be extremely professional in appearance and manner, willing to accept direction, quick to learn new things, and computer savvy. Superior phone and computer skills required.

Essential Duties and Responsibilities (Additional duties may be assigned):

- Assist the Advisors with the review of current clients' portfolios and financial situations
- Assist Advisors in the development and implementation of client financial plans
- Maintain records for client interactions
- Assist Advisors with client meetings
- Attend client events
- Attend business meetings and trips with Advisors, such as national conferences

Qualifications: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. MFG is an Equal Opportunity Employer and that nothing in the job posting or description should be construed as an offer or guarantee of employment.

Language Skills: Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the public.

Mathematical Skills: Ability to work with mathematical concepts such as probability and statistical inference, and fundamentals of plane and solid geometry and trigonometry. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

Reasoning Ability: Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

Computer Skills: To perform this job successfully, an individual should have knowledge of Microsoft Office Word, Microsoft Excel, Microsoft Power Point, and Microsoft Outlook. An individual should have a high technical ability to learn and successful use industry standard software and programs.

Education/Experience:

- Minimum of a bachelor's degree
- A degree in financial planning and/or investments is preferred

Certificates and Licenses:

- FINRA series 65
- CERTIFIED FINANCIAL PLANNER™ professional or someone interested in obtaining the certification
- State life and health licenses or the ability to pass those licensing exams

Knowledge, Skills and Other Abilities:

- Professionalism
- Oral communication skills
- Written communication skills
- Ability to socialize with clients in the office and at events
- Time management skills
- Ability to change direction quickly
- Ability to proactively determine needs and actions
- Ability to work as a team member or alone

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hands; and talk and hear. The employee is frequently required to reach with hands and arms. The employee is occasionally required to stand; walk; climb or balance; stoop, kneel, crouch or crawl; and taste and smell. The employee must occasionally lift and/or move up to 50 pounds.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually moderate.

Benefits: Paid holidays, paid vacation, sick/personal days, 401(k) and certain insurance benefits.

Interested students can send their resumes to: dj@marmofinancial.com