Support Advisor

Position Overview: Seeking a reasonably proactive, quick and amiable communicator whose primary role will be working with a dynamic leader in the management and maintenance of existing and new clients as an extension of the lead advisor's relationship and planning. Highly organized, an ability to complete tasks/projects with accuracy, thriving in a rapid, fast paced environment with a variety of work requiring deadlines and punctuality, all while providing great customer experience... is critical to enjoying this opportunity.

A natural affinity to "read people" is helpful, and once credibility is established with a client, there will be an expectation to service the account without constant support from the Lead Advisor - so building trust through experience and actual planning recommendations is the growth opportunity. Crisp, specific, works with a sense of urgency but remains highly detailed, this role is about the pursuit of doing the best thing for each client.

Duties & Responsibilities

- Attend client meetings and take notes as requested; manage/delegate/complete all meeting follow-up items.
- Build financial plans. Enter data, manipulate the software, and come up with strategies, tactics and solutions to help clients achieve their goals.
- Initiate and field client calls on various planning items, miscellaneous requests, and advice on various topics as appropriate.
- Perform special request analyses for clients (e.g., mortgage analysis, social security analysis, etc.).
- Provide support for the financial planning needs of clients including:
    - Conduct research as needed and work with client's other advisors (attorneys, CPAs, etc.) to obtain all necessary data for financial planning analyses.
    - Prepare all retirement forecasts, cash flow analyses, education forecasts, insurance analyses, estate flows, etc.
    - Identify areas of opportunity for clients based on financial planning analyses.
    - Create drafts of financial plans.
    - Assist in the tax planning work the firm does.
- Prepare materials for client meetings; work with other team members to ensure client meetings are prepared for thoroughly and accurately.
- Present various topics as needed
- Liaise with client's CPA's, attorneys and accountants as needed.
- Assist with special projects as required.
- Run the Social Security Analyzer for the advisors and clients.
- Attend client events

Qualifications

- Bachelor's degree preferably in business, accounting, finance, economics or related experience.
- Certified Financial Planner™ designation desired.
- Proficiency in Microsoft Office; experience with various financial planning, CRM, portfolio management and document management software.

Other Skills & Experience

- Continuously exhibits personal integrity and professional initiative.
- Reliable, follows through on commitments, does not shrink from new challenges.
- Possesses a passion to help new and existing clients.
- Must be organized, detail-oriented and able to manage and prioritize tasks.
- Demonstrates a commitment to accuracy by delivering high quality work.
- Excellent written and verbal communication.
- Collaborative and able to work effectively with others.
- Flexible team player who is highly adaptable to change and open to new ideas.
- Demonstrated ability to work successfully in an entrepreneurial, small company environment.
- Uphold firm's purpose, vision and values.

Benefits

- Health Insurance
- Paid time off (4 weeks to start)
- 12 paid holidays
- 401(k) with matching contribution and profit sharing
- Annual bonus
- Professional development assistance
- Ongoing access to training and opportunity for professional growth.

At Seaside Wealth Management there is a career path for advancement within the firm. We provide ample time and training to set you up for success on your path to promote to Lead Advisor. This includes compensation for further education within the financial services field. The right candidate will be groomed to promote to Lead Advisor in the future. This is your chance to play a key role in the future success of our fast-growing organization while you assist us in our mission of helping clients achieve peace around the issue of money.

We champion our employee strengths, guide their development, and invest in their long-term success. We hire optimistic, resourceful, result-oriented, and adaptable people with the desire to help our clients, their teammates, and themselves succeed.

Interested applicants can send their resumes to Stephanie Page, stephanie@seasidewealth.com.