Job Announcement for Associate Financial Advisor/Paraplanner Wiemann Wealth Strategies

Are you a licensed professional in financial services seeking a position where you enjoy your colleagues, love your clients, and have autonomy in your work? Do you want a position that allows you to utilize/grow/develop your sales skills? Do you like learning new things in the dynamic, ever-changing investment advisory business? Do you prefer to serve in a fiduciary capacity, making a difference in your clients' lives? Do you thrive in a hybrid position that allows you to work remotely 2 days a week, and 3 days in the office? Do you seek the personal satisfaction of serving wonderful clients who appreciate what you do? If you want to build or sustain a long-term, satisfying career in the financial services industry, please consider joining our team!

We are seeking a full-time associate financial advisor/paraplanner to join our growing, successful financial planning and investment advisory firm. We need a SERIES 7, 66, financial advisor based in Santa Fe. This person will work remotely 2 days a week and will work in our Los Alamos office 3 days a week. The assistant advisor will support the producing Financial Advisor/Branch Manager by performing important daily tasks: new client onboarding, client account maintenance, executing trades, insurance case prep, client reporting, and general advertising/marketing tasks. While sales activities are expected in this position, your compensation is not dependent on sales. This is considered a long-term position in a growing firm, therefore only staff interested in a long-term commitment to financial services and our firm should apply.

Wiemann Wealth Strategies is an independent financial advisory practice affiliated with Raymond James Financial Services. We provide financial planning and investment management services to long-term investors. We primarily serve retired or soon-to be retired scientists, engineers and working professionals in the greater Los Alamos and Santa Fe communities. Raymond James has a robust technology and CRM platform, along with strong back-office support to facilitate effective care for our clients.

Minimum Requirements:

2 years financial service industry experience

SERIES 7 FINRA active securities license

SERIES 66 FINRA investment advisory representative

Bachelor's degree

Not a recreational drug user. Must pass a drug test and FBI background check

No history of securities license suspension, revocation; or financial liens, judgments, bankruptcy

Reliable transportation and ***commitment*** to work in our Los Alamos office 3 days/week

Very strong attention to detail

Successful track record of Remote work

Strong computer software and Windows skills (e.g., Zoom/Webex, Microsoft Teams or Skype for Business, scanning, MS Office, Outlook, and CRM)

Strong communication and problem-solving skills, whether in person or remote

Goal-driven, loyal, honest, and committed to nurturing and furthering a long-term career in financial services industry

High degree of self-regulation. Must work effectively in a remote capacity and have a team-oriented mindset

Confident and comfortable communicating with customers/clients/colleagues. Must be able to discuss and promote sales opportunities with clients when appropriate.

Ability to interact/empathize with co-workers, colleagues and clients from different backgrounds and age groups

Reliable, effective, and hard-working

Client-First mindset

Covid-19 Vaccine is mandatory for all Wiemann Wealth Strategies employees unless granted an accommodation under applicable state or federal law. This requirement will apply to those working on-site, those teleworking and all new hires.

Preferred Qualifications:

State of NM life and LTC insurance license, or ability to obtain upon 90 days of hire

CERTIFIED FINANCIAL PLANNER™ or on path to CFP® (passed exam)

5 or more years work experience in the financial services industry

Auditing or Compliance Background

Producing Financial Advisor Experience

Tax expertise

Experience managing and/or delegating work to others

Previous paraplanner work, and/or experience using Financial Planning Software (e.g., Moneyguide Pro, E-Money, etc.)

Have an existing network of professional colleagues, clients, and contacts; enjoy networking

Have existing professional networks (e.g., Trusted Advisor, Rotary, FPA, local non-profits, etc.)

Benefits:

Salaried Position Commensurate with Experience. This position offers a base salary with incentive compensation opportunities

Unlimited paid time off that applies when specific high productivity standards are met

Employer-Provided 401k, including 4% Employer Match and optional Profit-Sharing

10 paid-Holidays, following NYSE Holiday Schedule

Guaranteed time-off during Christmas/New Year's week

Paid Earned Sick Leave, effective July 1, 2022, 1 hour per 30 hours worked (Maximum 64 hours per year can be used), per the Healthy Workplaces Act (HB 20).

Access to affordable Group Life and Disability Income Insurance

Access to employer-subsidized health insurance

What Makes Wiemann Wealth Different:

Autonomy and room to grow in a fun workplace with varied tasks and responsibilities

Combination of time working independently and in coordination with others

Hybrid position that allows remote and in-person work

Unlimited paid time off policy

Office closes early on Fridays year-round

Excellent Work-Life Balance coupled with career progression potential

For Consideration, Send Cover letter, Resume and Three Professional References to
Shelly A. Tarantello,
Financial Advisor / Branch Manager
CERTIFIED FINANCIAL PLANNER™ Professional

WIEMANN
WEALTH STRATEGIES

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