CERTIFIED FINANCIAL PLANNER™

THE PRIMARY RESPONSILITY FOR THIS POSITION IS TO PROVIDE FINANCIAL PLANNING AND INVESTMENT MANAGEMENT ADVICE TO EXISTING COMPANY CLIENTS AS WELL AS CONTRIBUTE TO ACQUIRING NEW CLIENTS THROUGH ESTABLISHED NEW BUSINESS DEVELOPMENT STRATEGIES.

NOTES: US Residents Only. Bonus DOE

Requirements

TECHNICAL WORK REQUIRED TO PRODUCE RESULTS: -Present Educational Seminars to Prospects and Clients -Qualify prospects by conducting client profile interviews to assess suitability and establish scope of relationship -Provide Financial Planning analysis to seminar attendees and referrals -Design Financial Plan based on Goals and Values and make appropriate recommendations -Establish timeline for implementation of Client's personalized Financial Plan -Provide clients with semi-annual account and relationship review -Execute Company marketing and referral process -Establish/maintain strategic alliances with affiliated professionals who will enhance and support our Financial Planning process -Respond to client and prospect inquiries and issues -Be committed to providing highest quality advice and service -Participate as member of Investment Management Committee -Contribute to Company Strategic Objective