finivi UNLIMIT YOUR LIFE | Financial Advisors

Position Description – Financial Advisor Trainee

We are currently interviewing Financial Advisor Trainees who will work as part of a team under the direction and mentorship of a highly experienced lead advisor. The FA Trainee is primarily responsible for working with existing clients of the firm as well as sourcing new potential clients and delivering client-centered advice in all areas of financial planning and investment management, both in-person and virtually to clients nationwide.

Although a salaried-based position, which is central to our philosophy of providing our clients with objective, unbiased advice and guidance, our advisors have unlimited income potential through the firm's incentive compensation program.

Qualifications:

- Must be willing to obtain CFP Designation within 36 months of hire
- You are outgoing and not afraid to get on the phone and make things happen
- Bachelor's degree required, preferably in Finance, Economics or Business
- Life, A&H Licensed, Series 65 FINRA Registration Required (Will Sponsor)
- Tech savvy, comfortable conducting virtual meetings using Zoom, Teams, etc.
- Self-motivated to succeed through perseverance, resilience, and grit
- Basic understanding of financial, retirement, and investment concepts
- Concise, confident, and engaging communication skills
- Very organized with strong attention to detail, analytical and problem-solving skills
- High standards of professionalism, ethics, and integrity

Primary Responsibilities:

- Expand and grow existing client relationships, while also initiating new client relationships through effective sourcing, networking, capitalizing on referrals, local market, and community involvement, and conducting educational workshops and webinars.

- Meet with clients in person, or remotely, and determine client's planning and investment needs while properly demonstrating the benefits of the firm's fee-based planning and investment management solutions.

- Recommending investment strategies, risk management products, and planning services that are suitable based on the client's specific needs, risk tolerance, and planning objectives

- Attain designated business goals as an individual and as a productive member of the team.

- Develop long-term client relationships through the ongoing delivery of client-centered financial advice, proactive review meetings, and highly responsive and impeccable client care.

- Keep current on the financial markets, cryptocurrencies, economic conditions, financial planning topics, tax law changes, etc., impacting the advice being offered

How to Apply:

If you are interested in joining our team, apply online through our website www.finivi.com. You can also apply by sending an email with a cover letter and resume to ejansen@finivi.com