Lead Advisor

J BLACK FINANCIAL GROUP, a successful and rapidly-growing boutique wealth management firm is looking to add an experienced Lead Advisor to manage and provide financial planning advice to existing clients, as well as develop new business. We are expecting to double our revenues over the next 4-5 years and need talented, hardworking individuals who are expected to contribute not only in their specific roles, but also to the direction and growth of the overall enterprise.

The firm provides comprehensive, fee-based financial planning, fee-based investment advisory solutions, education funding strategies, holistic wealth management, retirement planning and risk management.

Responsibilities:

- Serves as primary client-facing point of contact on behalf of firm.
- Focuses on complete client care and delivering on promises made to client.
- Directly responsible for client satisfaction with firm and retention of client accounts.
- Manages and supervises formulation and implementation of risk and investment strategies consistent with comprehensive financial plan prepared for each client individually.
- Responsible for increasing assets under management from assigned client base.
- Responsible for finding new revenue opportunities to service existing clients more effectively.
- Responsible for connecting to heirs of clients and engaging those heirs with firm.
- Responsible for building Loyal Client Advocates and producing new clients through those relationships.
- Publicly represents the firm's strategic brand.
- Participates in and contributes to firm leadership.
- Maintains familiarity with industry and economic trends and applies knowledge to client service and relationships.
- Maintains knowledge of and shows ability to apply compliance standards.
- Works collegially and productively with clients, peers and other team members.

Requirements:

- Minimum of 5 years of financial planning experience.
- History of clean compliance record.
- Excellent communication and problem-solving skills.
- Securities (6 & 63) and life & health insurance licenses.
- Ability to work with a close-knit team.

Preferred:

- Existing client base that can be merged with current business.
- CFP® designation.
- Series 65 and 7 licenses.

Compensation/Benefits:

- Salary.
- Potential for incentive compensation.
- Potential for ownership position.
- Health insurance.
- Short-term disability insurance.
- Long-term disability insurance.
- Life Insurance.
- Retirement plan.
- Paid time off.

www.jblackfinancialgroup.com