

Support Advisor:

J. BLACK FINANCIAL GROUP, a successful and rapidly-growing boutique wealth management firm is looking to add an experienced Support Advisor to provide technical support. 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 include but are not limited to:

- Preparing client review materials for review meetings.
- Preparing and modifying financial plans for new and existing clients.
- Preparing and modifying investment proposals for new and existing clients.
- Preparing and processing paperwork needed for fee-based advisory accounts.
- Discussing potential rollover opportunities from other retirement plans.
- Reviewing and maintaining appropriate account asset allocations by proposing trades within accounts and acting on approved trades.
- Monitoring, processing and following up on asset transfers and on initial and subsequent funding of accounts.
- Participating in client meetings for financial or investment plan development and presentation.
- Corresponding with clients to handle advisory related service issues.
- Explaining advisory products or advisory performance to clients.
- Gathering of data.
- Case design and scenario building.

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.
- Extremely high attention to detail.

Preferred:

- CFP® designation.
- Series 7 license.

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.