Job Title: Financial Advisor
Reports to: President & COO
Location: New Albany, Indiana
Job Status: Salaried/Exempt

Opportunity

- Seeking a knowledgeable and client-focused **Financial Advisor** to join our team
- The candidate will have the opportunity to be part of a team-based environment; the role involves servicing existing clients, along with growing their respective client base.

Duties & Responsibilities:

The ideal candidate will provide personalized financial guidance to individuals and businesses, helping them make informed decisions about investments, savings, retirement planning, insurance and other financial matters. The role requires strong analytical skills, excellent interpersonal abilities, and a deep understanding of financial markets and products.

- Assess clients' financial needs, goals and risk tolerance to develop tailored financial plans.
- Provide recommendations on investment strategies, asset allocation, retirement planning, tax strategies and estate planning.
- Assist clients with insurance planning, including life, health and long-term care insurance.
- Monitor market trends, financial products and economic developments to advise clients on investment adjustments.
- Educate clients on financial products and services, ensuring transparency and informed decision making.
- Maintain and grow a portfolio of clients through networking, referrals and ongoing relationship management.
- Ensure compliance with industry regulations and company policies.
- Collaborate with other financial professionals, such as accountants and estate planners, to provide comprehensive financial solutions.
- Keep accurate records of client interactions, financial plans and transactions.

Minimum Qualifications & Requirements

- *Education:*
  - Bachelor's degree in business and/or finance/accounting
  - Series 65 and Life Insurance license required
  - CFP preferred or willingness to obtain in first 12 months.
  - MBA preferred
- *Skills & Abilities:*
  - Analytical and systematic thinking
  - Attention to detail
  - Influencing, motivating and negotiating skills
  - Proven work-related analytical experience
  - Strong interpersonal and communication skills
  - Active in professional lifelong learning
- *Experience:*
  - 3-5 year's experience in wealth management or similar role.