GEORGETOWN
FINANCIAL GROUP, INC.
Helping to fund the future.

Position Title: Associate Advisor

About Georgetown Financial Group, Inc.

Since 1991, Georgetown Financial Group (GFG) has grown into a distinguished national full service financial services company with approximately 100 financial advisors at Cetera Advisor Networks.

As an independently managed producer group, GFG's advisors provide financial planning and wealth management services, designing and implementing detailed strategies to help our clients accumulate, protect, and transfer wealth. Integrity, leadership and compassion for helping clients is what drives our financial advisors each day.

Our mission is to empower independent advisors to be the trusted guides of your clients' financial futures. With our background as client-facing advisors, we have the direct experience and the resources to help you meet your objectives and advance your business to the next level. Whether you are an emerging practice still building your client roster, an established firm looking to refine your service model and target a niche, or a transitioning firm contemplating an appropriate successor, we can assist you every step of the way. We are a partner with a solid foundation for your immediate needs and long-term challenges.

Position Description

Responsible for managing existing client relationships, either working with a more experienced advisor or on their own. The individual may be responsible for formulating and implementing advice, but may also rely on technical specialists to develop product, investment, or planning recommendations.

Position Responsibilities

- Develops clientele of their own.
- Follows up on leads to the firm.
- Follows the prescribed workflow process for planning or reporting activity in preparation for client meetings or reviews. Handles the Onboarding Checklist: o
    - Performs Discovery Meeting prep – Assists advisor in preparation of initial meeting with prospect
    - Attends Discovery Meeting with advisor, take notes to be added to CRM
    - Performs Solutions Meeting prep – Assists advisor in preparation of solutions meeting with prospect, which may include the use of financial planning software such as eMoney or MoneyGuidePro
    - Puts together client paperwork package, financial planning overview and fee information with the help of admin
    - Performs Implementation Meeting prep – Assists advisor in preparation of implementation meeting with prospective client
    - Activates client in financial planning software
    - Preps for 45-day review
    - Logs all activity into CRM

    - Handles the Client Review Checklist: Runs financial plan
    - Runs household accounts report
    - Runs asset allocation model review
    - Creates financial plan review with planning software for accounts under our management
    - Runs performance report
    - Adds all information to CRM
- Works with lead advisor on client event presentations

Required Skills & Experience

- Bachelor's degree in business, administration, accounting, finance, or similar field of study
- Minimum of two years' experience in the financial services industry
- Series 7, 63, 65 and Life Insurance licensed
- Strong interpersonal skills
- Strong time management and organizational skills
- Ability to prioritize and manage multiple projects
- Ability to recognize and provide solutions to problems
- Exhibit strong ethics and a desire to help clients and give them extraordinary service
- Must want to grow and develop your business consistently adding to the firms assets under management and revenue
- Must pass criminal and background checks