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

Position Title: Independent Investment Advisor

About Georgetown Financial Group, Inc.

At Georgetown Financial Group (GFG), we realize that while you want to remain independent, you may not necessarily want to go it alone. Having the right team behind you is essential when pursuing your vision of success. That's why our hallmark regional team structure, which combines national resources with local support, has proven to be the right choice for advisors like you. Our distinctive model empowers you with the benefits of a big firm but the culture of a smaller one. It's why we are one of Cetera Advisor Network's most successful super OSJs.

Established in 1991, our mission at Georgetown Financial Group 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. For more information, visit www.gfginc.com or contact John DeSalva at 203-544-9300 x 12 or john@gfginc.com

About Cetera Advisor Networks

Cetera Advisor Networks, Inc. is one of the nation's largest privately held, independent broker-dealer and registered investment adviser families. It provides award-winning wealth management and advisory platforms, comprehensive broker-dealer and registered investment adviser services, and innovative technology and financial planning tools for more than 2,300 independent financial professionals nationwide.

Benefits To Partnering With Georgetown Financial Group

We provide you with:

- Dedicated mentors who help accelerate your growth and focus on your profitability
- A supportive team that's devoted to your continuous success
- Freedom to determine your own revenue model and select wealth management solutions that work best for you
- Sophisticated in-house technology tools and platforms that provide you access to the information you need to serve your clients
- A single source for proven, results-oriented business development solutions.

Our infrastructure was built to support YOU, the advisor and your need for assistance with:

- Practice management
- Succession planning
- Marketing and client acquisition
- Financial planning
- Ease of operations

Additionally, we're able to help you:

- Help individuals identify their unique financial needs and objectives by utilizing holistic financial planning approach
- Provide individuals with tailored wealth and investment solutions, with the goal of growing and sustaining long-term returns as well as long-term firm relationships
- Develop customized wealth management plan to address each client's outlined goals and implement the plan with suitable products and services
- Partner with specialists in tax and estate planning, insurance, group and employee benefits to uncover client and prospects needs and provide client solutions as needed
- Nurture and maintain strong relationships with clients, helping them to achieve and maintain their goals, tracking their progress while providing ongoing consultation and support
- Generate new firm clients through a range of business building programs including conducting seminars, using personal contacts and leveraging centers of influence
- Recommend plans and products to help clients achieve their goals; identify appropriate investment and insurance solutions; discuss estate issues, tax considerations, and retirement or business planning objectives.

Qualifications

- Previous experience creating and monitoring investment portfolios based on individual client needs, objectives and risk tolerance
- Experience assessing and making recommendations on retirement planning, estate planning, tax planning, insurance and other personal finance issues
- Passionate about client service; relationship driven, trusted advisor
- Excellent communication, presentation and interpersonal skills
- Confident, highly motivated and result-driven with a keen sense of integrity and entrepreneurial spirit
- Proven ability to build a client network and passion to cultivate and foster relationships

Licenses

- Series 6 or 7, 63 (or 65 & 66) required
- Ideally at least one professional designation
- Clean U-4