



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

Position Title: Investment Advisor

About Georgetown Financial Group, Inc.

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.

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.

Position Overview/Summary

The Investment Advisor/Wealth Manager is responsible for providing investment guidance and financial planning for businesses and individuals, expected to provide sound advice and analysis on a variety of investments, including individual equities and fixed income instruments, managed accounts, commodities, alternative investments, insurance products among others. The role of the Investment Advisor/Wealth Manager is highly entrepreneurial and involves extensive client management and development, new client prospecting and financial consultancy.

The role is responsible for building and maintaining long-term relationships with a portfolio of financially successful clients. As the external face of the firm, the Investment Advisor/Wealth Manager is expected to work closely with key firm personnel to provide a superior client experience across the full spectrum of the client's financial life.

Position Responsibilities

- 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
- Meet with clients on a regular basis to review portfolio performance and to uncover unmet personal and business financial needs

- 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.
- Sell effectively and ethically, comply with all FINRA, SEC, and satisfy continuing education requirements.
- Remain up-to-date on industry developments, service and product enhancements, regulatory issues, client needs and wants, and so forth.

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