Box Financial Advisors has been helping people experience an exceptional life since 1989, and we are looking to hire a Client Service Associate to join our growing team and continue that mission.

FIRM OVERVIEW

- We are affiliated for securities and advisory business with Cetera Advisor Networks through the AdvisorNet Financial region. AdvisorNet Financial also provides insurance and additional advisory business services.

- Our mission is to **create an environment where people can experience an exceptional life**. This includes our staff, advisors, service partners, and clients. We want everyone's life to be more exceptional for having met us.

- Our values are **Faith, Trust, Excellence, and Care**
    - **Faith** - Our primary goal is to honor God by working hard and serving our clients to the best of our abilities.
    - **Trust** – We honor the trust our clients place in us, and we ensure our client's interest is our only interest.
    - **Excellence** – We are passionate about achieving excellence in all we do. We strive to set a new standard for what a financial advisor should be.
    - **Care** – We do whatever needs to be done to help clients navigate life's many transitions as they pursue an exceptional life.

- We have a 16-person team of Financial Advisors (7) and Support Staff (9). Some of our advisors also serve support functions.

- Our office hours are flexible with a full day of work starting before 8:30 AM and ending after 3:00 PM. If you want to start early and finish closer to 3:00 PM, you can. If you want to start closer to 8:30 AM and finish later, you can. Much of this will depend on your role and needed availability for other team members.

- We work together and try to live together a little bit too. We do quarterly community service projects (past projects have included Feed My Starving Children, Habitat for Humanity, Ronald McDonald House, and Second Harvest Heartland). We also get together for fun off-site events throughout the year.

COMPENSATION/BENEFITS

- **Regular Compensation**: Regular compensation is paid on a salary, overtime exempt basis. We are a growing firm and build our compensation accordingly. Regular compensation will ultimately be offered based on the candidate.
- **Bonus Compensation**: Bonus compensation is available to all staff. Calculations for annual bonus are completed in December and are primarily determined by the firm's assets under management.
- **401k:** 6% 401k match with additional 1% profit-sharing match for up to 7% for 2021.

- **Insurance:** We offer an employee insurance package including life, disability, AD&D, and health insurance through group plans.
- **Personal Time Off:** We offer an all-inclusive PTO policy for all staff members, meaning staff do not have to distinguish between "sick" time and "vacation" time.

SUCCESS TRAITS AND QUALIFICATIONS

The ideal candidate will have the following traits:

- **Task-Oriented**: Getting a job done should be a motivating factor for your work.
- **People-Oriented**: You should enjoy talking to and assisting people with their needs.
- **Experience-Focused**: You should enjoy making everyone's experience exceptional.
- **Detail-Oriented**: You should obsess over getting it right the first time.
- **Tech-Savvy**: You should know your way around office systems like MS Suite, CRM, and Document Management. You should also be able to identify many common technology problems and be capable of solving at least some of those problems independently.
- **Team-Oriented**: You should embrace help and helping among team members. You should actively build a team environment and work within a team to solve problems and blaze trails.

The ideal candidate will have the following qualifications:

- **Education**: You must have a minimum of a bachelor's degree (Preferred in Business, Office Administration, Finance, or related field).
- **Experience**: You must have a minimum of 5 years of experience facilitating exceptional financial planning and wealth management relationships between clients and advisors.
- **Licensing**: While not required, being a registered representative (Series 7 & 63) in good standing is preferred. Having an active insurance license (Life & Disability) in Minnesota or the ability to obtain within 90 days is required.

RESPONSIBILITIES

- Fostering exceptional relationships with financial planning/wealth management clients
- Facilitating exceptional relationship between client and financial advisors
- Maintaining CRM and digital filing records
- Facilitating client wealth management service needs
- Maintaining advisor meeting calendars
- Maintaining excellent working relationship with high production financial advisor
- Reporting and tracking business with high production financial advisor

RESUMES

Resumes should be accompanied by a cover letter. Please be sure to include a mention of your favorite vacation experience in your cover letter.