

Financial Advisor Job Description / Posting

Retirement Strategies, Ltd.

5060 Parcenter Ave. Suite A. Dublin, Ohio 43017

www.retirement-strategies.com

Retirement Strategies, Ltd., an independent Registered Investment Adviser, is seeking to hire a Financial Advisor to join our financial planning and investment management firm. Candidates will assist us in our mission of helping clients achieve their financial and retirement planning goals. This is your chance to advance your career as a comprehensive financial advisor and play a key role in the future success of our fast-growing organization! Candidates will be required to undergo fingerprint and background checks.

CFP® Certification

Any current or future financial advisors will be required to study and attain the CFP® Certified Financial Planning certification within 5 years.

Responsibilities & Activities

- Meet with and oversee client meetings and comprehensive planning direction
- Work closely with Client Service Team (CSMs and Supporting Planner)
- Advise comprehensive investment portfolio including outside 401k, 403b, pensions, etc...
- Support internal portfolio management system
- Perform other duties as assigned

Knowledge, Skills, & Abilities

- Requires:
 - Excellent attitude and communication skills
 - Long term commitment to company and clientele
 - A strong focus on getting the details right
 - Excellent organizational and time management skills
 - Awareness of comprehensive financial issues and application to the planning process
 - An ability to handle multiple tasks within tight time frames
 - Proficiency with Microsoft Office Suite
 - Strong analytical and research skills
 - Strong verbal, written, presentation, and interpersonal communication skills
 - BA/B S degree in finance-related field from an accredited institution
- Benefits
 - Salary is commensurate with experience.
 - Retirement Plan
 - Vacation Time
 - Flexible work environment in a professional office location in Dublin, OH

This is an opportunity to play a key role in the path your career takes and in the continued success of our company. Our culture is fast-paced, collaborative, and focused on improving our client's lives.

For more information about our company, please visit our website www.retirement-strategies.com.

If you're interested in this opportunity, please send your resume and letter of interest to Jay Lindner at jlindner@retirement-strategies.com