



Financial Representative

The Bulfinch Group, Needham, MA

Why You Should Consider a Career as a Financial Representative:

As a Financial Representative at The Bulfinch Group, your work is impactful; you're making a living doing what you love, while simultaneously benefitting the community. Your expertise helps families and individuals gain security, clarity and confidence in their financial world.

It's not just a career, but is a lifelong experience that leaves a lasting imprint on others you work with. You will be in control of your time, income and destiny. You'll have tremendous satisfaction knowing that you are building your own practice and helping your clients protect their financial future. In addition, you'll enjoy unlimited earning potential based on the commitment, time, and effort that you put into impacting others' lives.

About The Bulfinch Group:

The mission of The Bulfinch Group is to serve our clients with respect, passion and integrity. We encourage a collaborative environment that strives to enhance existing relationships; discover and build new ones; and to help everyone we meet to live their best life possible. We deliver nothing short of excellence.

Our philosophy – be professional, give back and have fun – is the cornerstone of The Bulfinch Experience. Our commitment to our community is strong and is a vital part of our culture. We promise to be the “Best at Getting Better.”

We Make a Difference.

Job Description

- Develop and maintain a base of clients who value your input and guidance
- Work with clients to create a customized plan by understanding their unique goals, concerns and current financial information
- Continuously provide clients with current information related to their financial products and services
- Recommend financial services and products to meet client needs
- Ensure that your clients' financial plans are current and aligned with their goals

Qualifications:

- Self-motivated with a dynamic personality, resiliency and passion for succeeding
- Strong desire to help others achieve financial success
- Driven to expand current network by cultivating and enhancing long-term relationships
- Passion for client-services
- Strong listening and communication skills
- High attention to detail
- US citizen or permanent resident
- Four-year Bachelor's degree
- Five years of work experience



Benefits

Quality people deserved to be recognized for their performance. In addition to the opportunity to achieve unlimited growth potential in the finance industry, you are eligible to enjoy a substantial compensation package that includes:

- High earning potential with one of the most lucrative contracts in the business
- Comprehensive benefits package including a Defined Benefit Plan, 401(k) with match and Roth options, health and dental insurance, and more
- Extensive training, coaching, mentoring and collaboration
- Opportunities for leadership development and management positions

If you're looking for a career that satisfies your entrepreneurial spirit, this could be a fulfilling career for you.

For more information, please call Doug at 781-292-3257.

Job Type: Full-time