THE BULFINCH GROUP

Financial Representative Protégé

OVERVIEW:
The ideal candidate will be an integral component of the financial planning team, learning and contributing in multiple areas. Through diligence, passion and purpose, our team relentlessly pursues enhancing client engagement, fostering an elite client service model, and collaborating on outcomes, all which drive our clients' confidence.

Responsibilities Include:

- Client Meeting Support
  - Software support using The Living Balance Sheet® (LBS) during client meetings
  - Take notes of the dialogue with clients to ensure accuracy of conversation / records and commitments / follow-ups made by both advisory team and clients.
  - Build out appropriate LBS® and other preparation needed for client meetings to include: Morning Star Reports, Insurance Portfolio Analysis, Property and Casualty Review, Corporate Benefits Review, Cash Flow Analysis, etc.
  - Working with Center of Influence (COI) relationships such as APEX Group, Attorneys, CPA's, P&C Agents, and others to ensure clients data has been reviewed for opportunities.
  - Meeting preparation by discussing key findings, observations and opportunities.
- Marketing:
  - Work with team to continue to maintain current COI relationships, and also meet new additional potential COI relationships (attend events with team member such as NE500, BNI, Chamber, YPNG; eventually attending more events independently once comfortable with message / approach).
  - Prospect through LinkedIn and alternative sources to get in front of desired clientele.
  - Using the 10X multiplier list to gather introductions.
  - Manage social media initiative and marketing strategies (team website, LinkedIn, Facebook).
- Operations:
  - Conduct analysis, research and execute on our task list and client commitments agreed to in-between meetings (i.e. portfolio analysis, mortgage analysis, insurance analysis, etc).
  - Point person for E-Apps (Life, LTD) and cross train with Lynn to learn the underwriting process and calendar management process.
  - Attend educational / wholesaler training events to participate in team / firm study groups as discussed and agreed to.
  - Participate in firm-wide events and applicable training / education events.

TRAINING FOR SUCCESS
At The Bulfinch Group, we believe that providing world-class service to our clients starts with investing in your success. We hire talented individuals from various backgrounds who possess the skills and tenacity needed to succeed. Through our unparalleled support and training, we are simply enhancing the skills you already possess.

As a member of The Bulfinch Group, you will have access to online, in-person and off-site training and development programs. With all of the support behind you, we are able to work together to provide our communities with world class service.

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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 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.

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