Pacific Capital Resource Group, Inc.
Planning Your Financial Future

Bellevue | Seattle | Lake Oswego

10900 NE 8th Street, Suite 1550, Bellevue, WA 98004
1601 5th Avenue, Suite 2000, Seattle, WA 98101
5335 Meadows Road, Suite 388, Lake Oswego, OR 97035

Discover the opportunities in becoming a Financial Adviser with Pacific Capital

IMPACT | *Independence* | **Resources** | intellectual stimulation Income | PROFESSIONAL DEVELOPMENT | passion | *culture* | VALUES | **COLLABORATION** | *take charge* | **SUPPORT** | **success** | *professionalism*

Experienced or Entry-Level Financial Adviser

Pacific Capital Resource Group, Inc. is one of the fastest growing financial services firms in the Northwest, currently directing the financial lives and managing assets for thousands of individuals and businesses in the Pacific Northwest. We are seeking high caliber individuals who will succeed in a fast-paced, dynamic environment. Our market is comprised of high income tax bracket individuals and business owners, where our expertise in tax planning and tax sensitive investing provides added value. We provide superior support and compensation for entry-level advisers and experienced Financial Planners.

Job Description

To assist up-scale and emerging up-scale individuals to meet long-term financial goals such as retirement, college tuition, and estate planning, with heavy emphasis on tax reduction. Once a comprehensive financial plan is developed, assistance is provided to the client in all phases of implementation. For small businesses, we also design and implement 401(k) and other retirement plans, with special emphasis on Selective Benefit Plans for highly-compensated employees and owners. Training program leads to Certified Financial Planner and/or Chartered Financial Consultant designation(s). Salary plus commission plus bonuses upon completion of proper licensing. Full benefits.

Job Requirements

- Bachelors degree or higher; financial services, finance, economics, business administration, accounting or law preferred.
- Track record of success in academic and/or career endeavors.
- Can handle long hours and rigorous training.
- Impeccable character: All applicants will be subject to extremely thorough background checks, including criminal and credit checks as well as drug testing.

It is encouraged that applicants have grown up and/or lived in the greater Portland Metro area for three years or more.

It is my pleasure to introduce to you Pacific Capital Resource Group, Inc. It is our mission to ***improve the lives of our clients through disciplined, common sense planning that delivers results****. The financial professionals at Pacific Capital value integrity, professionalism, commitment and service. To best serve the needs of individuals, families and businesses, we will never sell products until need, desire and affordability have been determined, the final judge being the client.*

Kurt D. Jonson, CLU®, ChFC®, CFP®
President

LAKE OSWEGO OFFICE
Andy Ouellette
Recruiting Specialist
503-352-0618 Ext. 240 | aouellette@pcrg.com

BELLEVUE/SEATTLE OFFICES
Joe Sievers
Recruiting Specialist
206-332-7038 | jsievers@pcrg.com

www.pcrg.com

Our Culture

Pacific Capital's culture is truly unique. We believe that each associate is a valuable contributor to the overall effectiveness of the firm. The sharing of concepts and ideas is paramount to the growth of each adviser's practice, so we believe in cultivating an environment that promotes collaborative development. Our advisers are passionate about the work they do and also want to inspire that ethic into those around them. We are a hard-working, high performance, no-excuse team of professionals who want to take charge of our own careers. At Pacific Capital we also believe that if there is a reason to celebrate, it calls for a celebration, whether it is in a Monday morning meeting, free time after work, or in an awards ceremony.

Our Training Program

We know that training and education matter. The education and resources we provide lead to confidence, and confidence leads to achievement, which is why development of new advisers and the growth of seasoned advisers is so important. A combination of a 3-month training/internship along with an award-winning training program led by the industry's most qualified professionals, we help build a plan for your professional development as well as your success. Our advisers are given time and resources to begin earning professional designations to advance within the industry, including the Certified Financial Planner, Chartered Financial Consultant, Masters of Science in Financial Services and Certified Life Underwriter.

Where your work impacts lives.