

Wealth Advisor

Description:

Are you interested in a career helping people pursue financial freedom? Do you have a passion for serving others and a willingness to learn? If so, we want to hear from you. We have an immediate opening for a **licensed wealth advisor** who is willing to be stationed in our **Newport, Oregon** office. Professional experience is preferred but for the right candidate, we will provide the training you need for this position.

Our firm is comprised of fun, compassionate, community-minded individuals who love being part of a diverse, energetic team. A successful candidate must embody our values of treating all people with respect, never compromising our integrity, delighting our clients, and embracing our team culture. The ideal candidate must also be committed to our promise to care deeply about our clients and their financial lives.

Responsibilities & Activities:

- ◆ Provide service to clients and potential clients via regular meetings and communication
- ◆ Obtain or hold Securities and Insurance licenses
- ◆ Continue and maintain up-to-date knowledge and training on all programs used for financial planning and research
- ◆ Prepare for client appointments and create reports
- ◆ Conduct securities-related transactions and help steward client's wealth
- ◆ Attend and actively participate in client events and activities
- ◆ Build and foster stronger relationships with existing client base
- ◆ Manage client concerns when other Wealth Advisor(s) are beyond the local office

Knowledge, Skills & Abilities:

- ◆ 2 years of securities knowledge or sales experience
- ◆ Series 7, 66, Life and Health licenses required, or the ability to obtain within 12 weeks
- ◆ Bachelor's Degree desired but not required
- ◆ Exceptional attention to detail
- ◆ Excellent attitude and team player
- ◆ Excellent organizational and time management skills
- ◆ A burning desire to succeed
- ◆ An ability to handle multiple tasks
- ◆ Excellent interpersonal skills
- ◆ Excellent computer skills
- ◆ Excellent oral and written communication skills