



Role Description

Title: **Client Advisor**

Reports to: Team Lead

Benefits: Yes

Status: Full Time

Date: June 2021

Role Summary

The Client Advisor takes responsibility for all aspects of the client relationship and implements The Joseph Group's full-service financial planning model. A successful candidate will:

- Live and exemplify The Joseph Group's Core Values of Integrity, Teamwork, Humility, Excellence and Enthusiasm
- Have a true passion for helping clients live great lives
- Be a self-starter and be skilled at dealing with multiple clients, prospects and priorities
- Have one to three years of experience as a client facing Advisor

Duties and Responsibilities Include, but are not limited to:

Client Advisor

- Execute The Joseph Group (TJG) full-service financial planning model (TJG Way) for clients
 - **Purpose**
 - Assess client goals and encourage clients in their purpose
 - Utilize TJG's tools to illustrate how a client's wealth aligns with their purpose (e.g. TJG Storyboards)
 - Celebrate client stories
 - **Plan**
 - Help clients with specific planning topics/projects such as Net Worth development, cash flow evaluation, retirement projections, mortgage refinancing, Social Security or pension optimization, Roth conversions, college education, insurance, and estate planning...
 - Utilize e-Money
 - Coordinate with and involve other outside advisors (attorneys, accountants, insurance agents, etc.)
 - **Portfolios**
 - Serve as a member of the TJG Investment Committee and actively contribute to ongoing investment dialogue
 - Utilize TJG investment communication tools
 - Review outside accounts and provide recommendations
- Live our Commitment to Simplify, Clarify, Encourage

Business Development

- Do the activities necessary to drive individual new business to the table at The Joseph Group
 - Use client referrals, centers of influence, personal network, and networking events
- Engage in team business development initiatives and Rocks
- Participate in Joseph Group Business Development Team activity and follow-up
 - Attend Events: Wealth Summits, Portfolios @ Panera, Portfolios and Pints, Mixers
 - Create/participate in Joseph Group seminars/presentations

Team Member

- Create Leverage
 - Delegate tasks to Associate Client Advisor to create leverage for Advisor and Team
 - Assist the Team Lead with Team initiatives to create leverage for the Team Lead
- Develop and mentor Associate Client Advisor
- Utilize CRM system effectively for good team communication
- Assist other Team members when needed
 - Help Team Lead, other Advisors, and/or Associate Client Advisor
 - Spearhead internal company projects
 - Step into referral and new business opportunities

Qualifications

This position typically requires the following qualifications:

- Ability to assist Team Lead and/or other Advisors when needed
- Work experience that demonstrates knowledge of financial industry and planning concepts
- Excellent communication, listening, and relationship building skills
- Strong project management skills – organized, detail-oriented, and able to multitask and prioritize
- A passion for caring for clients
- CFP® designation or current pursuit of the CFP® designation is a plus
- A Team player in The Joseph Group's "Best Places to Work" culture
- Desire/ability to work successfully in a small company environment
- Proactive, self-motivated personality
- Proficiency in Financial Planning Software, Office Suite and beyond

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Salary will be based on experience
- Benefits include health insurance, 401(k), disability insurance...
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

Contact

Send resume and cover letter to:

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The Joseph Group is an Equal Opportunity Employer