Cedar Brook GROUP

CULTIVATE TODAY.™

Financial Advisor:

Our team provides a holistic and calm approach to financial planning, wealth preservation, and wealth creation for our clients. We are looking for a Financial Advisor to join our team that always puts clients first, is optimistic, positive, and passionate about helping people meet their goals. Being proactive, helpful, and collaborative are necessary skills to be successful here. You must be tenacious with a "can do" attitude always focused on doing the right thing for the client.

Responsibilities include:

Meeting with clients to determine their financial objectives, risk tolerance, income, expenses, and assets.

Offering strategic advice on products and services, such as investments, insurance coverage, and debt management tools.

Securing stocks and bonds and establishing progressive savings accounts.

Moving money from accounts per industry and federal regulations.

Performing market research to stay current with financial trends.

Preparing financial documents, such as income projections and investment reports.

Identifying and pursuing potential clients to maintain a strong client base.

Requirements:

4 year degree in a business related filed or established career in sales/service working with high net worth families.

Please forward resumes to cament@cedarbrookfinancial.com