SKOLNIK
RETIREMENT SOLUTIONS

Financial Advisor

Skolnik Retirement Solutions is seeking a motivated and relationship driven individual with a proven sales record to join their team.

The ideal candidate is interested in a long-term opportunity helping a successful financial planning practice grow. Key attributes include willingness and ability to learn about the financial profession, integrity, and a desire to earn a high income. As an independent firm with a history of 30 successful years of operation, we strive to offer clients the best solutions for their retirement planning needs.

Our continued growth requires that we add a Financial Representative / Investment Advisor Representative to our team. This individual will need to ethically and honestly exhibit fiduciary care for a specific group of clients while helping the firm grow. Acting in the clients’ best interests at all times will be the primary focus of this role.

Duties Include:

· Seeking out and building a client base through educational seminars and workshops, referrals, etc.

· Taking new clients through a thorough fact-finding and needs analysis process, getting to know their goals, priorities, etc.

· Developing and presenting unique comprehensive wealth management/income plans.

· Regularly monitoring plan(s) to make sure clients are on track with their goals.

· Reviewing clients’ plans yearly to make sure they keep on track to meet goals and objectives.

· Responding to client requests for service and trouble-shoot service issues.

· Adhering to compliance policies and procedures.

· Supporting the team as needed with the company’s entire client base.

Qualifications:

· Bachelor’s degree.

· Minimum of 1 year of experience in the financial industry.

· Health and Life license, **or ability to obtain one** within a short time frame, is required.

· FINRA registration with a series 65, **or ability to obtain them** within a short time frame, is preferred.

· Satisfactory background check and a clean compliance record.

Qualifications:

· A team player who isn’t afraid of any assignment, no matter how large or how small!

· A confident individual comfortable with closing a sale.

· Articulate and comfortable communicating in both large and small group settings.

· Open-minded and willing to consider new or different products that might best meet our clients’ needs.

· Quick learner of new technologies.

· Warm and professional demeanor.

· Excellent organizational and follow-through skills.

· Ability to anticipate and solve problems.

What we offer:

· Opportunity to earn a high six figure income.

· Competitive Salary plus Commission.

· All lead generation costs are covered by the firm.

· Professional training and mentoring.

. Professional Office Space with costs covered by the firm.

. Administrative Assistant with costs covered by the firm.

- Company paid licensing and professional development.
- A genuine career in wealth management that focuses on clients’ needs.
- The opportunity to utilize every talent you have!

This position is located in Sandusky, OH and Amherst, OH.

To apply go to:

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