

Financial Advisor (salaried)

We are seeking a dynamic financial advisor to assist in servicing our existing client base and grow with our company by doing the following:

- Meet with current clients and prospects to understand their circumstances and goals (Care approach)
- Develop and present a plan to help optimize client's current financial situation
- Implement the financial plan and adjust over time as needed
- Meet with clients regularly to monitor investments and offer guidance
- Build relationships with current and prospective clients to help maintain and grow client base
- Work closely with other advisors and senior management

If you are career-driven, motivated, and have a desire to assist in providing clients the highest quality service possible, we invite you to apply and let us help you achieve professional growth.

Requirements:

- 5-7 years proven working experience as a financial adviser, private banking professional, planner, specialist, or relevant experience
- Accuracy, attention to detail and the ability to explain complex information clearly and simply
- Ability to deliver exceptional client service
- Excellent communication skills both verbally and written
- Professional presentation
- Current Series 7 and 63 licenses
- Unblemished record and U4
- Moderate PC knowledge and ability to operate CRM database systems
- Book of business a plus, not required

We offer:

- Competitive base salary, plus quarterly bonus potential
- Benefits package
- Company matched IRA
- Training provided
- Relaxed working environment

Szarka Financial has been serving individuals, large companies, small businesses, and communities in Northeast Ohio since 1985. We differ from our competitors in many ways. First, we are firm of financial planners — not a sales organization. We work in our clients' best interests and solely for them. Second, we provide a caring team approach, providing personal attention every step of the way. At Szarka Financial, all clients are firm clients and are counseled in the same manner and receive the same innovative level of advice and hands-on, personalized service. Third, we provide customized solutions for our clients—not a “cookie cutter” approach to financial planning. Szarka Financial is featured on Cleveland's own Fox 8 news.

Qualified candidates should email a cover letter and resume to:

Dino Centracchio

Chief Operating Officer

careers@szarkafinancial.com

Equal Opportunity Employer

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