Financial Advisor | Certified Financial Planner

AMG Wealth Advisors is a woman owned advisory firm serving high-net-worth individuals, multi-generational families, and institutional investors who seek insightful financial counsel, experienced guidance, and seasoned advice for the prudent management of assets through all of life's experiences. To devote the time, attention, and resources necessary to serve our select group of clients, we maintain minimum thresholds for investable assets of $1M for individuals and families, and $10M for institutional investors. Many of our clients have assets well above these minimums. Every client receives individual care from our managing partners, customized financial plans, and investment strategies for their unique life goals.

We are seeking a full-time Financial Advisor/Certified Financial Planner to join our vibrant and growing practice. This is an exciting opportunity if you are looking to work with a fiduciary that has $300M AUM, offers professional development for continued growth in your career, and believes in holistic financial planning.

- Responsible for the ongoing management of existing client relationships, retention of clients and growing total assets under management
- Participate and conduct client meetings over video conference and/or in person as the situation warrants within COVID restrictions
- Analyze information obtained from clients to determine strategies, products and services to help those clients build long term wealth
- Grow assets under management from existing clients
- Educate clients about the purpose and details of financial products, services and strategies
- Implement financial planning and investment strategies
- Build and maintain client base, keep client plans up-to-date
- Onboard new clients
- Interact with clients periodically to determine if there have been changes in their financial status or investment objectives.

We are currently focused on expanding our client portfolio to include Millennials and young professionals, developing long term relationships as they grow their financial assets and seek advice to expand their wealth.

Requirements

- CFP (Required)
- Series 65 License (Required)
- Insurance License (Required)
- Current transferrable AUM (strongly preferred)
- Bachelor's degree with a concentration in Financial Planning, Accounting, or Business Administration
- 2-4 years previous experience as planner/advisor providing personal financial planning services
- Proficient use of web-based platforms including NetDocs, Teams, One Note, and the O365 suite.
- Prior experience with Black Diamond, MoneyGuide Pro, FI360, Morningstar, and Salesforce CRM

Our clients come to AMG Wealth Advisors for an opportunity to receive comprehensive services from a close-knit team. Our team members shine in their disciplines, bringing specific expertise that contributes to a customized financial plan and wealth management strategy, complementary investment and asset management strategies, and steady, long-term protection of our clients' assets over time and through changing conditions. We are seeking new team members with

- The ability to work as part of a small team with strong follow through
- Excellent communication and interpersonal skills
- Innate desire to grow and continuously improve
- Heart of a servant
- High level of organizational skills and ability to prioritize multiple demands

Benefits

- Monthly Draw & Competitive Payout
- 100% employee healthcare premiums
- 50% employee dental & vision premiums
- Company matching 401(k)
- Flexible PTO

We request applicants send a cover letter outlining why they are attracted to our firm and why they would be a good fit for our team along with resume to:

Lori Morris
Co-Founder/Managing Partner
AMG Wealth Advisors
Lori.morris@amgwealthadvisors.com