Financial Advisor

Stephen's Wealth Management Group (SWMG) is a well-respected and nationally recognized comprehensive wealth management firm, with a strong history dating back to 1975. It is our mission to enable clients to confidently plan for a future that inspires. We do that, in part, by living our firm core values: *Integrity, Collaboration, Excellence, Innovation, and Community Conscious.* SWMG, an independent RIA, manages client assets of more than $750M with our team of 13 employees made up of Financial Advisors, Client Service Representatives, and Operational professionals. As we look to further grow the business, we are hiring a ***Financial Advisor*** passionate about helping clients achieve their goals and interested in developing with the firm. Responsible for both new client acquisition and working with existing clients, the Advisor will be supported by SWMG's strong leadership, investment, planning, marketing, and client service teams. Note that we are open to an acquisition associated with an Advisor's existing clients that fit our model.

What You Will Be Doing

The Financial Advisor, based in Oakland (preferably) or Livingston County, is primarily responsible for growing new business, providing great service to existing clients, and contributing to the overall organization through his/her unique talents and expertise. The position requires an individual with demonstrated business development and relationship management skills. The qualified applicant must also have strong communication skills, be goal-oriented, and be able to work well in a self-directed and collaborative environment. This includes the ability to:

- Contribute to the organization's growth through new client acquisition
- Participate in the development and execution of the SWMG marketing strategy and cultivate strong COI relationships
- Prepare for and lead client investment portfolio and financial planning review meetings
- Serve as a member of SWMG's Investment Committee, embracing the investment strategy of the organization, providing education to clients as well as answering their questions, and communicating investment recommendations
- Collaborate with other professionals on clients' behalf
- Adhere to all compliance/risk procedures, follow corporate and industry protocols, and protect the interest of the client and the firm always
- Actively participate in firm meetings, sharing ideas, feedback, etc.
- Engage in a variety of community activities, boards, clubs, etc.

What You Will Need for this Position

The following knowledge, skills, and abilities are required to effectively meet the needs of the position.

- Exceptional business development skills
- Experience developing, positioning, and presenting comprehensive financial plans and investment strategies to clients
- Leadership skills and a desire to help grow the business and others
- Strong interpersonal and collaboration skills
- Strong attention to detail and accuracy, to include personal quality assurance practices

- Excellent computer skills (Word, Excel, PowerPoint) and the ability to learn in-house technology (e.g., Tamarac, MoneyGuidePro, Junxure, etc.).
- At least five years of experience in the Financial Planning industry and at least two as a Financial Advisor
- Series 65 or equivalent credential
- CFP (Complete or willing to complete within an agreed upon timeframe)
- Familiarity with eMoney Advisor®, MoneyGuidePro, and/or Tamarac is considered a plus
- Bachelor's degree

Benefits

- Merit-based performance bonus tied to development
- Healthcare coverage
- Employer-matching 401(k)
- Paid vacation and personal time
- Disability insurance
- Focus on employee development and advancement
- Stocked snacks and beverages

We are proud of our diverse environment, EOE, M/F/D/V

If you are interested in applying for the position, please send your resume to Kim Waldman at kim.waldman@stephenswmg.com. For more information about the firm, please visit our website at www.stephenswmg.com.