

Financial Advisor

Organization:	Delta Financial Advisors Inc.
Date Posted:	11/16/2021
Date Needed:	12/1/2021
City:	Kensington
Location:	Maryland
Country:	United States
Primary Category:	Financial Planning
Type of Position:	Full-Time
Education Requirement:	Bachelor's
Experience Requirement:	1-2 years

Description & Details

Delta Financial Advisors, Inc. located in Kensington MD is looking to add an experienced Financial Advisor(s) to our team. We are a SEC registered hybrid RIA firm that is relationship-focused, providing comprehensive wealth management and retirement income planning for a diverse client base. As an advisor on our team, you will use your knowledge and skills obtained through experience, education, and training to help ensure clients achieve their financial plans.

This position is a perfect opportunity for a Financial Advisor who wishes to develop professionally by learning Delta's successful methodology while working with experienced advisors. Developed over 30 years, Delta's full service financial planning supports clients from wealth accumulation through retirement and wealth preservation.

The candidate for this position will need to possess the following knowledge, skills, and education:

Knowledge, Skills, and/or Abilities:

- Demonstrate proficiency in financial planning principals
- Possess a genuine interest in serving and caring for clients while being able to start and hold conversations with a diverse demographic of individuals independently
- Demonstrate a willingness to go above and beyond for exceptional customer service
- Comfortable being a key component in a small team of professionals
- Detail oriented with a commitment to accuracy

- Demonstrate an understanding of financial markets and can effectively simplify complex financial concepts while building relationships with clients
- Strong time management and organizational skills
- Comfortable with multitasking and changing priorities.
- Willingness to help improve and develop processes for the back office to better support advisor activities
- Experience with Junxure, TD Ameritrade, SEI and American Funds a plus
- Proficiency with Windows and Microsoft Office

Education and/or Requirements:

- Polished, friendly, professional demeanor
- CFP certificate
- FINRA Series 7 and 66 and or 65 strongly preferred
- Ability to successfully pass a background and credit check
- Experience in an independent financial services firm preferred
- Bachelor's degree, preferably in finance, accounting, or related field
- Impeccable SEC and FINRA record (no disclosures)

Delta provides competitive salaries and excellent employee benefits.

We are also open to discussions with CFP's that would bring their own book of business with them.

How to Apply / Contact

Please email Delta Financial Advisors, Inc at Bhowatt@dfa1.com