Arlington, VA

Associate Financial Advisor

RECRUITER

Jesse Lineberry, CFP®

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INTERESTED?

Apply here:

https://bit.ly/3ssQIl9

NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing a well-established, highly reputable fee-only RIA in Arlington, VA that is seeking an Associate Financial Advisor. Detailed job specifications available once we connect and agree it is a mutual fit.

INDUSTRY LEADING FEE-ONLY RIA

Our client is one of the most recognized in the nation with a defined niche serving clients undergoing significant life, financial, or career changes. Leveraging a tech stack that includes Junxure, MoneyGuide Elite, eMoney, Holistiplan, and Riskalyze, along with training from The Kinder Institute of Life Planning and the Sudden Money Institute, this is an opportunity to join a team of expert advisors. If you are an authentic, curious, compassionate, coachable, and team-oriented professional with 3+ years' planning experience, this is the opportunity you've been waiting for.

RESPONSIBILITIES WE'LL TRUST YOU WITH

You will be expected to demonstrate a passion for providing unparalleled service to the firm's clients. Attend and participate in client meetings as part of a 2-person advisor team. Coordinate client advice with other professionals such as CPAs, estate attorneys and insurance specialists. Review and prepare meeting materials. Take ownership of the financial life plan creation process. Perform ad hoc financial planning and investment research. Serve as a point of contact for the firm's clients. Provide support for the firm's marketing efforts and oversee the progress during the onboarding process of new clients.

QUALIFICATIONS

BA/BS from an accredited university. CFP® designation required. 3+ years' experience in personal financial planning required. Client facing experience required. Familiarity with MoneyGuide Elite and Junxure are strongly preferred. Must be gracious, honest, and comfortable with Financial Life Planning. Possess a balance of deep technical financial planning knowledge and strong emotional intelligence. Must strive for a high touch, proactive approach to client relationship management.

THE PERKS

Competitive salary based on experience. 401(k) with Safe Harbor contribution. Flexible, hybrid work schedule. Paid parking. Generous leave policy. Health/vision/dental insurance reimbursement. ST/LT disability insurance coverage. Group life insurance. Professional development budget. Opportunity to pursue life planning and the Certified Financial Transitionist certification. Clear path to becoming a lead advisor and the opportunity for eventual equity ownership.