

Advisor

About Physician's Resource Services:

Physician's Resource Services continually strives to make financial planning easier for physicians and their families. For decades, PRS has worked with physicians to help them transition from residency to practice and prepare for retirement. PRS's daily objective is to save our clients valuable time by reducing their hours spent planning and organizing their finances. Our team of advisors offers guidance in each core element required for a comprehensive financial plan: insurance, investment, tax, and legal – all working together as one team. Our goal is to give clients back their time, allowing them to be a better doctor, spouse, parent, and friend.

Job Description:

(THIS ROLE IS REMOTE) We are dedicated to helping physicians and other professionals create effective income protection and wealth accumulation strategies. We are seeking a qualified individual to help support, grow, and be a great addition to our financial planning team. We are very supportive and provide a friendly, caring, and dedicated working environment for great people.

Primary Tasks:

- Utilize company technology to accomplish client goals
- Review and interpret financial statements
- Answer questions and provide readily available information to clients as it relates to servicing their accounts
- Contribute to the growth of the business and come up with innovative ideas to help clients

Our ideal candidate should also have the following skills:

- Has earned their CFP designation and/or is dedicated to continuing improvement of industry knowledge
- Attention to detail with strong analytical skills
- Able to handle a high volume of work with an extreme attention to detail
- Has a genuine interest in serving and caring for other people
- Has excellent organizational, task, and time management skills
- Likes to work proactively — not reactively
- Solves problems with long-term solutions
- Comfortable with spreadsheets, databases, and eMoney
- Has excellent interpersonal skills
- Ability to prioritize tasks effectively

- Ability to work independently
- Must have the ability to learn and retain information about procedures, clients, and related information

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Visit our website at <https://physiciansrs.com>