A growing fee-only Registered Investment Advisor firm located in New Kent, Virginia, is seeking an experienced Financial Advisor to assist in our mission of helping people align their finances and investments with their values.

Description

The Financial Advisor will be an integral part of a team providing comprehensive, value-based financial advisory services to our clients. The Financial Advisor will also provide financial literacy education to our community. The position will be hybrid, with one or two days of in-office days per week. The position will service existing "house" accounts as well as any new prospective clients in the Richmond/Williamsburg region.

Our firm believes in a full service, team-based approach. Certain team members are stronger on the financial planning side of the relationship, while others are better suited for the investment management side. While successful advisors will understand both disciplines and have responsibilities across each one, we are looking to hire talented, hard-working individuals and allowing them to fill the slot they enjoy the most.

Responsibilities & Activities

Work with financial planning team to create financial plans, cash flow strategies and provide specific advice for clients of various ages and backgrounds.

Assist investment team in creating customized investment portfolios.

Provide information and education to clients about the purpose and details of all aspects of the financial plan.

Prepare and summarize client meetings by scheduling and confirming meetings, enter data into contact manager, build the agenda and summary of meetings, and provide vital follow-up.

Prepare and ensure new business paperwork successfully submitted which includes preparing forms, obtain appropriate signatures, prepare documentation to send to custodian, and coordinate rollovers.

Coordinate, gather and prepare information for quarterly and annual reviews.

Facilitating client portfolio and risk tolerance reviews.

Communicate with clients by phone, email, online meetings and in-person.

Coordinate money movement, strategy changes and paperwork for existing clients and prospects.

Maintain all continuing education requirements of a financial advisor as well as any additional required training.

Assist with other duties as needed to support the smooth operation of the office.

Knowledge, Skills, & Abilities

CERTIFIED FINANCIAL PLANNER™ or CHARTERED FINANCIAL ANALYST designation a bonus

Active Series 65/66 license

Exceptional interpersonal and communication skills.

Money Guide Pro and Redtail experience a plus.

Proficient in Microsoft Office.

Excellent attitude and extraordinary client service orientation.

Professional demeanor.

Ability to handle multiple tasks and priorities simultaneously.

Business Development Skills.

Desire to achieve additional certifications, including CFP or CFA.

In exchange for your expertise, we offer a competitive fixed salary, quarterly incentive pay, 401(k) with matching/company contributions, health benefits, and a great working environment. For more information about our company, please visit our website www.semwealth.com

Submit Resume and Cover Letter to:

Garland Scott – gscott@semwealth.com