Evangelista & Associates
Wealth Management for University Faculty and Staff

Servicing Financial Advisor

Evangelista & Associates is looking for a Servicing Financial Advisor to join our growing team. This position works with both Lead and Senior Advisors to deepen existing client relationships. The Servicing Financial Advisor serves as a client service liaison and makes daily client contact through face-to-face meetings, emails, and phone calls.

You are expected to perform various tasks, including portfolio reviews and preparing financial projections using financial planning software. You must be able to use critical-thinking skills, work within a team, and anticipate firm needs and client questions. Qualified candidates are detail-oriented, structured, possess excellent presentation skills, and have a high degree of follow-through.

From an Analyzing Perspective, you will:

- Prepare financial analyses for clients, including retirement, estate planning, education-funding, stock options, and risk-management needs analysis.
- Be responsible for all aspects of pre-client-meeting activities, such as preparation of meeting agendas, client paperwork, investment policy statements, and asset allocations, as well as post-client-meeting tasks such as developing meeting notes, performing financial situation analyses, and coordinating planning implementation with outside professionals if necessary.
- Continuously monitor clients' financial situations with detail and accuracy.
- Coordinate client meetings, prepare portfolio performance reports, verify the accuracy of the information, and develop preliminary recommendations in conjunction with the Advisor.
- Input and analyze financial plans to achieve clients' objectives/goals.
- Work on Asset Allocation and rebalancing of client accounts and employer-based plans.

Operationally, you will:

- Facilitate completion of agreed-upon recommendations; open new accounts, process and follow up on transfers, submit the required paperwork and follow up with clients.
- Assist clients in completing applications for annuity and insurance as well as processing those applications.
- Track newly opened accounts and transfers.
- Serve as client service liaison and make daily client contact through email and phone calls.
- Maintain existing client relationships through processing client requests, resolving client inquiries, and ensuring essential client information and documentation are up to date using E&A Customer Relationship Manager (CRM).

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Skills and requirements:

- Bachelor's Degree in Personal Wealth Management; Finance, Economics; and/or Commensurate Experience. 1 - 4 years of experience in a Financial Planning Firm is a plus
- Exceptional oral, written, and interpersonal communication skills
- Works independently on various projects with minimal supervision as assigned by the Advisor
- Detail-oriented, organized, responsible and client-centric mindset
- Ability to set priorities and organize tasks to accomplish work objectives; able to multi-task in a fast-paced environment with tight deadlines
- The skills to take the initiative to move ahead on assignments in the most efficient, timely, and productive manner with minimal encouragement
- Must show good judgment and decision-making, have impeccable ethics and integrity, and complywith all regulatory requirements.
- Passionate about helping others and love working with a team
- Facilitates continuous improvement in their area of responsibility
- High regard for Evangelista & Associate's core values: Passion for Excellence, Integrity, and Compassion

About the company

Evangelista & Associates is a boutique Wealth Management and Financial Advising Services firm, located in Ann Arbor, MI. Established in 2003, we specialize in working with University Faculty & Staff to create and manage wealth and are dedicated to bringing lasting change to the lives we touch. Our firm has a fun and fast-paced environment. The firm has a deep commitment to each team member's goals and career aspirations.

Additional Benefits:

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Insurance -Employee Paid 50%; Employer Paid 50%

Medical, Dental, Vision

Insurance - Employer Paid - Life Insurance ($50,000)

Retirement - Simple IRA -Company match up to 3%/year.

Education - Tuition reimbursement for all required Licenses and Registrations, including Exam Fees.

Equipment -Laptop provided at company expense.

Extra Perks - Monthly education programs, team retreats, quarterly team building events, and/or happy hours. Generous paid time off as well as additional paid holidays.

Giving to Charity - Quarterly philanthropic activities planned by staff and supported by the company.

Compensation: We offer a competitive salary with bonuses and benefits.

Starting Date: Position is open for immediate consideration

For more information about Evangelista & Associates, please visit our website at: *www.university-wealth.com*

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