Position Title:	Financial Advisor
Location:	Irvine, CA
Position:	In Office
Hours:	Monday-Friday; 8am-5pm

MWM PLANNERS | WEALTH MANAGEMENT & FINANCIAL PLANNING
www.mwmplanners.com

Overview:
The Financial Advisor will play a critical role in serving existing clients MWM Planners. This position involves being the primary point of contact for assigned clients; developing and delivering comprehensive financial plans, and engaging with clients to understand their financial goals. This role will also assist with identifying, engaging, and onboarding new clients for the firm. Responsibilities include managing client communications, analyzing investment portfolios, and contributing to firm initiatives. The role requires attending client meetings, conferences and networking events, with travel required up to 5-15% of the time.

About Us:
MWM Planners is an independent financial planning and wealth advisory firm. We provide comprehensive financial counseling and investment advice to those in or near retirement, business owners and women responsible for their financial security. At MWM, we believe the intelligence, education, credentials, and experience of the team has allowed us to create a truly mindful approach towards personalized and trusted guidance for our clients.

Job Responsibilities:
- Primary point of contact with clients, speaking and meeting with them, developing and delivering comprehensive financial plans.
- Works with clients on all aspects of their financial lives including retirement plans, insurance, taxation, and estates.
- Leads client meeting, prepares materials, makes recommendations, executes plans
- Analyzes clients' investment portfolios and financial plans.
- Conduct business development and sales activities; including following up on leads and prospects from conferences or referrals
- Plan and participate in prospect calls to effectively communicate the value of our planning services and secure new client engagements.
- Help onboard new clients after obtaining detailed, accurate account and transfer paperwork information.
- Assist with client service items like beneficiary distributions, settling estates, transferring funds.
- Plan and execute high interest events and workshops for clients and their guests.
- Maintain client information and document client interactions, task progress, and account updates in CRM Redtail.
- Other duties as assigned.

Minimum Qualifications:
- Minimum of 3 years' experience providing financial advice, planning services, to clients and/or businesses
- FINRA Series 7 and a 66 or equivalents
- CFP designation preferred

- Preferred familiarity with CRM systems (Redtail) and financial platforms such as eMoney, Albridge, GReminders, MyRepChat, Pershing/NetX360, or Jump AI.
- Professional demeanor and strong interpersonal skills to effectively engage with clients and team members.
- Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and other office tools.
- Exceptional organizational skills with a keen attention to detail.
- Excellent follow-up skills with a proactive approach to tasks and responsibilities.
- Demonstrates initiative, identifying areas for improvement and taking steps to address them effectively.
- Strong written and verbal communication skills.
- Ability to prioritize and manage multiple tasks in a fast-paced environment.
- Must have a high willingness to learn new concepts, processes, and software and be a team player.

Additional Details:

- Benefit Eligible: Group health coverage, 401k retirement with employer contribution, paid vacation, sick, and holiday hours.
- Employment background and fingerprinting checks required due to regulatory compliance.
- Opportunities for professional growth and development; including continuing education.
- A supportive and inclusive work environment where your contributions are valued.

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