

## **Wealth Advisor**

Are you a financial advisor looking for faster growth opportunities? Do you feel like you work on an island without collaboration or support? Are you looking to join a team that will assist your growth plan through technology, admin support and subject area expertise? AMJ Financial Wealth Management is looking to hire a Wealth Advisor with the primary role of developing new client relationships and supporting existing clients.

### **Responsibilities**

- Identify and pursue new clients
- Lead review meetings for clients identifying new advice needs
- Accountable for client retention, handling day-to-day client management and advice delivery
- Provide financial solutions for clients through fact gathering and needs analysis
- Collaborate on preparation of financial plans with client services team members

### **Desired Skills & Experience**

- Series 7, 65 or 66 and a clean U-4 are required
- CFP or CFP Candidate is preferred
- Mature presence with sophisticated investors
- Good problem solving and analytical skills
- Ability to maintain professional demeanor in a high volume, fast paced office environment
- Experience in the following software a plus: Redtail, Black Diamond Performance Reporting, and MoneyGuidePro
- At least three years of securities experience

### **Company Description**

AMJ Financial Wealth Management, an independent Registered Investment Advisory company, is a 15 year old boutique wealth management firm providing clients with both portfolio management and financial planning. We specialize in Tax and Estate planning working with primarily high-net worth families, executives and women. Our firm's mission is to first seek to understand what success means to our clients, and then through superior advice and client service, provide them with a path to create their success.

If you are looking to grow within the Wealth Management industry, we offer a great working environment, salary and benefits (Support for CFP designation, 100% Employee paid Health Insurance, 3% company contribution to 401k, PTO, etc.), as well as a strong career path to grow within a dynamic company. Please send resume to [bbender@amjfinancial.com](mailto:bbender@amjfinancial.com). In the subject line please include the job description name.