JOURNEY TREE
Financial Planning & Investments

Financial Advisor Opportunity

Journey Tree Financial Planning & Investments is a successful, growing, fee-only financial planning and investment management firm. We have been providing comprehensive and objective advice to our clients for over 25 years. We offer an excellent work environment, salary, and benefits with significant mentoring and career advancement opportunities. In fact, this position has a built-in career track and training plan.

Journey Tree Purpose

Freeing our clients to enjoy their lives and pursue their dreams

Associate Advisor

You enjoy helping people and love to analyze information. You are eager to learn and advance in a financial services career. You want to be part of a team that helps clients achieve their life goals. You are flexible, adaptable, have a good sense of humor and relate well with others. You want to be part of a growing business and aspire to be a business owner.

Responsibilities

- Manage client review process
- Coordinate completion of tasks resulting from client meetings
- Develop and present financial plans and research planning issues
- Document interactions with clients accurately and quickly in the CRM
- Network with centers of influence and assist with other marketing activities
- Participate in prospect screening and meetings
- Develop a thorough understanding of Journey Tree investment process
- Make investment review presentations to clients
- Assist with client service and operations tasks
- Engage in regular professional development

Qualifications

- Impeccable character; caring and ethical, committed to putting a client's needs first. (All applicants will be subject to thorough background and credit checks.)
- Passion for a career in financial planning and the flexibility and enjoyment it provides
- Entrepreneurial team player in a small office environment
- Professional appearance and demeanor

- Confident and effective communicator and able to relate to a wide variety of clients
- Excellent analytical and organizational skills
- Positive attitude and committed to continuous professional development

Education/Experience

- Bachelor's degree
- At least three years' experience successfully working directly with a wide array of clients
- Experience in the financial services industry and familiarity with MoneyGuidePro desirable
- Must have or obtain a Series 65 securities registration within six months of hire
- Must possess or be willing to obtain CFP® designation
- Proficiency with Microsoft Office suite, especially Excel

Benefits

- Career track specifying advancement opportunities including the potential for ownership
- Training program and regular mentoring
- Competitive compensation package
- Company 401k plan and profit sharing
- Health insurance stipend
- Generous vacation policy
- Potential for educational reimbursements
- Budget for professional development and conferences
- Dues paid for memberships to professional organizations
- Working with existing clientele and assisting with firm-wide marketing efforts, no cold calling

Please send cover letter and resume to: careers@journeytree.com.