Position Description

Title: **Financial Advisor**
Reports to: Lead Advisor
Benefits: Yes
Status: Exempt

Are you passionate about making a difference in people's lives while thriving in a team-centric environment?

Who is SYM?

SYM Financial Advisors serves as a trusted expert to our clients, using our team's deep knowledge and vast experiences to be an advocate and help them achieve their vision of financial success. We are seeking a highly motivated Financial Advisor who can help us provide excellent financial planning and investment planning services to our clients.

In this role, you will have the opportunity to build strong relationships with clients and assist them with attaining their financial goals. Developing and maintaining financial plans for high-net-worth individuals is both intellectually stimulating and personally rewarding. A successful candidate will formulate, implement, and monitor a variety of planning strategies related to cash flow, income tax and estate planning, insurance and risk management, and investment portfolio analysis and oversight. This position is designed to provide a career path leading to the role of Lead Advisor.

To learn more about our company, visit this link: SYM Financial. Who We Are. (youtube.com).

What does this role entail?

Financial Advisors work closely in a team with a Financial Planner and a Client Service Representative to guide our clients in achieving their financial goals through holistic wealth planning. Primary responsibilities include, but are not limited to:

- Managing client relationships through ongoing client contact and communications to establish and maintain a complete understanding of their financial objectives
- Identifying and delivering exceptional client-focused customer service in all aspects of asset management, financial plan development and estate planning
- Serving as the primary point of contact for client relationships
- Overseeing and monitoring individual investment portfolios while ensuring alignment with client goals and objectives

- Consulting with attorneys, accountants and other advisors on financial, estate and tax planning
- Leading client meetings and presenting the financial plans
- Delivering educational presentations to clients and staff
- Developing new client relationships via existing client referrals and local centers of influence

What are we looking for?

Must Haves:

- You have a Bachelor's Degree from an accredited college or university; CFP designation strongly preferred
- You are proficient in Microsoft Office Suite, as well as financial planning and account management software
- You possess technical knowledge and experience in all aspects of financial planning which includes: financial planning; wealth management; qualified plan acumen and estate planning
- You exhibit excellent listening, written and verbal communication skills with a professional demeanor and a client-first attitude
- You have the ability to manage multiple projects and deadlines with a keen attention to detail
- You are a team player, with strong coaching and leadership skills
- You have the desire /ability to work successfully in a small company environment

What's in it for you?

Pay / benefits are competitive based on industry standards.

- Competitive pay based on experience plus incentive compensation
- Health Care, Vision, Dental/Orthodontic, Life, and LTD Insurance
- 401(k); 6% Match
- Paid Time Off / Parental Leave / Family Time Off / Volunteer Time Off
- Option for Pet Insurance / Fitness Match / Apparel Allowance
- Tuition / Certification Assistance Program
- A defined career framework to help you successfully manage your career goals