Wealth Management Associate Opportunity

Consider joining Smith Moore, a financial services firm established in 1913, headquartered in Clayton, Missouri with 10 offices in Missouri, Kansas and Illinois.

Begin your career as a Wealth Management Associate working with an experienced, well established Financial Advisor with the goal of building a partnership and team. We are looking for intelligent, ethical, young professionals with a passion for financial planning and a thirst for learning how to guide clients through the three stages of investing; Accumulation, Distribution and Legacy.

What we need from you:

- Undergraduate College Degree with Financial Planning or Business Focus
- Strong technology aptitude
- Professional communication skills
- Attention to detail
- Self-motivation and Self-Confidence
- Ability to pass the FINRA Series 7 and 66 License Exams within six months of hire
- Ability to prioritize responsibilities and manage more than one project at a time
- Positive attitude and sincere willingness to constantly learn and grow
- Team player with long-term focus
- Basic knowledge of financial markets and investment solutions in the industry
- CFP designation in three years

What you get from us:

- Competitive compensation and benefits package
- Opportunity to earn fees & commissions once licensed
- Bonus program
- 401(k) and Profit Sharing Plan
- Career Advancement opportunities
- Earn additional industry licenses
- Continuing education
- Invaluable mentorship
- Innovative culture
- Build your own Financial Planning/Wealth Management Practice while learning from your mentor and receiving stable compensation

What your days will be like:

Client Care / Business Management

- Maintain client contact during the financial planning process. Answer questions and provide readily available information to clients as requested by client or Financial Advisor
- Manage and resolve client service problems
- Identify unmet client needs to escalate to Financial Advisor
- Review and update client information as needed for client review meetings
- Attend and participate in client meetings if necessary
- Assist Financial Advisor with order entry and logistics of investment management

Wealth Management / Financial Planning & Investment Advice / Product Solutions

- Prepare for meetings
- Prepare preliminary financial planning recommendations and initial product solutions for Financial Advisor review and use in client meetings
- Develop portfolio/robust investment product solution recommendations that will fit the client's risk tolerance and time frame as well as develop appropriate product deliverables
- Review 401(k) and outside account holdings; facilitate data input into Smith Moore performance reporting programs, etc.

To apply, send your cover letter and resume to opportunities@smithmoore.com

SMITH MOORE

Providing financial advice since 1913