

Financial Advisor Career Description

OVERVIEW

As a financial advisor your goal is to develop your practice by building an active client base. You will work with your clients to assess their financial needs, develop strategies to help them achieve their financial goals, and then recommend appropriate financial products.

What you will do as a financial advisor:

- Identify market opportunities
- Develop and implement strategies to successfully access identified markets
- Build a sustainable client base
- Foster a long term relationship with clients
- Assess the financial needs of clients
- Create and implement financial planning recommendations*
- Conduct regular review meetings with clients
- Maintain a current working knowledge of relevant planning techniques, tax regulations, risk management products and investment vehicles, etc.
- Ensure timely processing of market orders, applications, etc.
- Maintain client records per current compliance requirements
- Maintain necessary licenses and registrations(i.e., CE requirements)
- Participate in firm and home office sponsored training programs

How you will spend your time?

35% Client Acquisition (marketing and prospecting)
35% Client Meetings
20% Needs analysis/development of client recommendations
10% Administrative

What skills and knowledge will you need for this career?

- Solid understanding of the financial planning process and needs analysis
- Working knowledge of products offered through Securian
- Effective communication and presentation skills
- Strong interpersonal and leadership skills
- Ability to motivate and inspire people to take action
- Analytical skills to evaluate client needs and make appropriate recommendations
- Effective time management and organization skills
- Ability to work independently and within a team

*Separate from the financial plan and our role as financial planners, we may recommend the purchase of specific investment or insurance products or accounts. These product recommendations are not part of the financial planning process.

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