Hurlow
WEALTH MANAGEMENT GROUP, INC.

Position Description

Title:	Associate Financial Advisor
Reports To:	Firm Partners
Status:	Full-Time; Monday-Friday
Salary:	$60,000 - $80,000 depending on experience and designations

Job Summary

We are seeking a Financial Advisor to join our team. Our Financial Advisors manage client relationships and actively participate in the advanced financial planning process to address retirement, risk management, estate planning, tax considerations, and more. Our Financial Advisors also manage cash, place trades, rebalance portfolios, and implement investment strategy on behalf of the firm's clients.

We are looking for someone with great personality, exceptional client service, and the desire to develop professionally in a fast-paced environment. We are a small firm where everyone has a strong work ethic, passion for our jobs, and deep care for our clients. We offer top of the line service.

Duties and Responsibilities

- ✓ Put clients' interest first, always.
- ✓ Develop financial planning and investment management recommendations while interpreting results using spreadsheets and planning software while meeting and maintaining client objectives.
- ✓ Provide continual support to clients by preparing information for client financial review meetings and participating in all client meetings.
- ✓ Enhance client relationships through continual and regular client contact and correspondence; provide follow up to all client inquiries, needs and requests.
- ✓ Manage and coordinate with team members on workflows.
- ✓ Develop areas of expertise on firm processes and advanced planning topics to add value to the firm.
- ✓ Engage in business planning efforts and actively support the firm's strategic priorities.
- ✓ Analyze processes and procedures to identify improvements or efficiencies that can be created.
- ✓ Engage in continuous learning in order to stay current in investment knowledge and skills.

Qualifications

- ✓ At least three years of work experience preferred but not required
- ✓ Bachelor's Degree in financial planning, finance, accounting, economics, or related field
- ✓ Series 65 license required within 90 days of employment
- ✓ Certified Financial Planner® designation preferred but not required
- ✓ Collaborative, positive attitude and ability to work with others
- ✓ Well-developed interpersonal and communication skills, both verbal and written
- ✓ Incredible attention to detail, organization, prioritization, and follow-through
- ✓ Strong ability to think critically and to process complex financial scenarios
- ✓ Ethical in decision making; sound in judgement
- ✓ Strong time management skills; ability to multi-task and manage deadlines
- ✓ Results driven, with the ability to take initiative
- ✓ Desire, drive and capability to work in a high volume and growing team environment
- ✓ Open and receptive to feedback and coaching

Benefits

- ✓ Comprehensive medical, dental, vision, prescription, and life insurance. 100% paid by the company.
- ✓ 401(k) retirement plan with 3% automatic company contribution after six months of service.
- ✓ Paid Holidays: We are closed every day the New York Stock Exchange is closed.
- ✓ Paid Time Off: Unlimited, after 90 days of employment.
- ✓ Paid Pregnancy Leave: Up to 12 weeks of paid leave.
- ✓ Paid Sabbatical: Up to four consecutive weeks, after five years of service.
- ✓ Paid professional development, such as advanced designations and annual conferences.

How to Apply

Interested applicants should send their résumés with a cover letter to Hurlow Wealth Management Group, 3925 Hagan Street, Suite 300, Bloomington, IN 47401 or email to gnesbit@hurlowwealth.com. No phone calls please.

About Hurlow Wealth Management Group

Hurlow Wealth Management Group is a small, collaborative team of financial planners, portfolio managers, and operations/administrative staff focused on helping our clients achieve their financial goals. We offer a clear, realizable career path for our employees based on measurable performance objectives. We provide training, mentorship, and educational opportunities, with a preference of promoting from within our talent pool. At Hurlow Wealth Management Group, we combine talented staff with industry-leading technology to offer our clients a superior experience.

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