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McCLARREN
FINANCIAL ADVISORS

Associate Advisor
Job Description

Overview: The role of Associate Advisor supports the firm's advisors by preparing for client meetings and providing ongoing service/maintenance to clients. The Associate will participate in client meetings by taking detailed notes and gaining experience for ultimately becoming a Lead Advisor if he/she so desires.

Qualities:

- Detail oriented
- Organized
- Communicates effectively with clients and staff
- Time management skills
- Polite and clear phone manner
- Ability to multi-task
- Strong prioritization skills

Responsibilities will include but are not limited to the following:

- Attend client meetings with Advisors in a technical, supporting, and learning role
- Work with staff to ensure that all necessary preparations have been made for upcoming client meetings and calls
- Coordinate with staff for client follow up
- Gather and organize client data for meeting preparation
- Understand major financial planning components including but not limited to:
    - Financial planning process
    - Financial statements
    - Investment principles
    - Tax planning
    - Insurance and other risk management tools
    - Retirement and employee benefits
- Adhere to our firm's compliance manual and other rules and regulations as required by our firm and regulatory authorities
- Knowledge of financial planning software systems
- Knowledge of client relationship management (CRM system)
- Positive attitude and sincere willingness to constantly learn and grow

Education and Experience Requirements:

- Bachelor's degree required
- Experience in management of client relationships preferred
- Proficiency with Microsoft Office suite, especially Excel
- Successful candidate will work towards Series 65 license and CFP® designation

Benefits:

- SIMPLE IRA retirement plan
- Paid vacation
- Competitive pay