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McCLARREN
FINANCIAL ADVISORS

Associate Advisor
Job Description

We are seeking an Associate Advisor for our fee-only firm located at our headquarters in State College, PA. We are looking for someone who desires a small firm environment; who wants to be learning and shaping the way we care for our clients. Someone who wants to study from two industry veterans; and is excited to work your way up our advisory career ladder. We want someone that fits into our firm's culture who will embrace new technology while working in a fun yet professional team setting.

Overview:
The role of an Associate Advisor supports the firm's Lead Advisors in managing existing and new client relationships. You will be expected to prepare for client meetings and providing ongoing service/maintenance to clients. The Associate Advisor must have thorough computer skills as you will be working with Microsoft Excel spreadsheets and the use of various financial programs including but not limited to Morningstar, Redtail, and EMoney. 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.

Job qualities needed (as described in various job duties):

- *Detail oriented* in that you will be responsible for coordinating implementation tasks with team members in post client meeting activities.
- *Organized* in gathering data from clients for meeting preparation.
- *Communicates effectively* with clients and team members whether in person, in email or on the phone.
- *Time management skills* are necessary when getting ready for several meetings each day.
- *Polite and clear phone manner* needed when anticipating or providing answers to clients' questions.
- *Strong prioritization skills* in moments where you have several meetings to prepare for at once.
- *Independent worker* in putting together meeting preparations including agenda, spreadsheets, and coordinating paperwork with other team members.
- *Utilize critical thinking skills* in working on post meeting implementation tasks.
- *Team Player with "no job is beneath me" attitude.* Be willing to take out the garbage or lend a hand with duties that smaller firms often take care of in-house.
- *Sincere willingness to constantly learn and grow* while studying for various exams such as Series 65.

Responsibilities will include but are not limited to the following:

- Attend client meetings with Lead Advisors in a technical, supporting, and learning role
- Work with team members to ensure that all necessary preparations have been made for upcoming client meetings and calls
- Coordinate with team 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 – Emoney, Morningstar
- Knowledge of client relationship management software (CRM system) - Redtail
- Successful candidate will work towards Series 65 license and CFP® designation (see benefits below)

Education and Experience Requirements:

- Four Year Bachelor's degree is required
- Proficiency with Microsoft Office suite, especially Excel

Benefits:

- SIMPLE IRA retirement plan with company match
- Paid vacation including having your birthday off!
- Competitive pay with year-end performance-based bonus
- 100% company paid continuing education courses including FINRA Series 65 exam, Annual Federal Tax Refresher (AFTR) course, and the Certified Financial Planner® program.
- Company paid parking
- No cold calling for prospective clients!