



## Financial Advisor - Wheeling, WV

### About the job:

The ideal candidate will deliver personalized investment solutions to help clients work toward their long-term financial goals. They should be comfortable creating financial plans and cross-checking work to ensure complete accuracy of information.

### Responsibilities:

- Provide financial planning support to clients
- Support investment professionals to cultivate client relationships
- Prepare financial plans and check their accuracy

### Qualifications:

- An entrepreneurial attitude with a desire for equity ownership opportunity
- Excellent presence on the phone and in person with other investment professionals
- Solid understanding of multiple investment vehicles (stocks, bonds, ETFs, mutual funds, alternatives) with ability to discuss and position effectively
- Ability to learn quickly and operate in a fast-moving environment
- Computer literacy and the ability to easily learn new programs
- A strong working knowledge of Microsoft Excel
- High attention to details
- Solid planning and organizational skills with the ability to prioritize
- Manage multiple projects with precision
- Self-starter that can take ownership
- Written and verbal communication skills
- Ability to learn new tools and programs quickly

### Requirements:

- Series 7 license
- Series 63 or 66 license
- Bachelor's degree in business administration, accounting, finance, or similar field of study
- 3-5+ yrs. experience working with investments and/or financial advisors

**If you are interested in joining our team, please email your resume to [info@cfsww.com](mailto:info@cfsww.com).**