Associate Advisor

Columbia, MD 21044

JOB DESCRIPTION

FAI Wealth Management is an award-winning, client centric financial planning firm that provides independent, comprehensive financial advice in a friendly, down-to-earth manner that inspires trust and confidence. Committed to treating others the way we'd want to be treated, we work closely with each client to understand their values and goals while creating tailored financial plans. We are looking for an experienced, self-motivated Associate Advisor to join our established planning team.

Our Associate Advisor will work alongside of a Senior Advisor and Client Service Associate to ensure a superior client experience is maintained throughout our planning process. As an integral part of the Wealth Planning Team, the Associate Advisor maintains a pulse on everything that impacts our clients and is responsible for overall client management and retention. Specifically, you will be responsible for the following:

Client Relationship Management

- Facilitate the wealth planning process, serving as a point of contact for clients, their families and their team of partners and advisors
- Prepare for, lead and quarterback to completion all ongoing client meetings and client service activities
- Maintain responsibility for all client contact and communication

Wealth Planning

- Build comprehensive, customized financial plans designed to meet the specific needs and concerns of our entrepreneurial clients
- Embrace the financial planning philosophy of the organization, providing education to clients as well as answering their questions and delivering recommendations
- Continually reinforce our value proposition with clients and encourage referrals
- Stay current on products, services and regulations that could impact our clients
- Direct and monitor workflows required to service clients

Strategic Alliance Development

- Develop strategic relationships with our partners to refer business and enrich the client experience
- Participate in the planning and execution of strategic alliance events

Experience, Skills, and Software Requirements

- Bachelor's degree, preferably with a concentration in financial planning required
- 2+ years of financial planning experience required
- Hands on experience with eMoney required
- CFP® designation holder or actively pursuing CFP® designation required
- Experience with financial planning and CRM tools; Redtail, Tamarac, Hidden Levers, and Fi360 preferred
- Knowledge of key financial, investment and risk management concepts
- A passion to help clients achieve their goals, and a desire to strengthen alliance partnerships to facilitate this work
- Strong attention to detail
- Appetite for Business Development
- Outstanding communication and relationship building skills