Lead Advisor

Columbia, MD 21044

Overview:

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 Lead Advisor to join our established planning team.

As a Lead Advisor you will embrace technology, enjoy a collaborative environment, and hold in high regard serving clients in a fiduciary capacity. You will work with additional team members, providing financial planning, investment advisory support, and facilitate business development initiatives.

Responsibilities:

Our Financial Advisor will be a team player and methodical business leader, working closely as a trusted advisor serving the sophisticated needs of high-net-worth individuals and families. You will build rapport and establish relationships with existing and target prospects, convert them to clients and facilitate them through our financial planning process. In addition, as a member of our planning team, you will contribute to our business development and marketing efforts. You will also facilitate and support associate advisors with their career development. More specifically, you will:

Provide a Superior Client Experience

- Manage the relationship and client experience from the beginning of engagement throughout the initial planning process
- Work with the planning team to develop financial strategies designed to meet the specific needs and concerns of our clients
- Maintain a pulse on every client, staying a step of ahead of their needs and exceeding their expectations
- Own the organization's value proposition and its matriculation through the client experience

Lead the Best Advisory Process

- Serve as an integral member of the organization's financial planning team; staying on the forefront of key financial, investment and risk management concepts and providing mentorship and education to prospects, clients, alliances and team members
- Provide daily support to the Financial Planning Team, conducting financial planning research and assisting in the preparation of customized comprehensive financial plans and portfolios for clients
- Coordinate client service needs with internal and external team members
- Memorialize client meetings and providing support to the overall client experience
- Gain an understanding of the investment strategy of the organization
- Direct and monitor workflows required to provide an exceptional client experience
- Stay current on products, services and regulations that could impact our clients

Facilitate Business Development

- Leverage local centers of influence to extend our referral network while continuously looking for opportunities to establish relationships with potential prospects, clients and strategic partners.
- Business development is eligible for bonus compensation.
- Participate in the design and execution of key marketing initiatives, facilitating client involvement
- Represent the organization externally by attending and/or presenting at client and alliance events.

Qualifications:

- Bachelor's degree, preferably with a concentration in Business, Economics or Financial Planning
- 5+ years of experience with advanced wealth planning
- CFP® designation is required
- Foundational knowledge of key financial, investment and risk management concepts
- A passion to help clients achieve their goals
- Demonstrated analytical and problem-solving skills
- Strong attention to detail, and exceptional follow through
- Outstanding communication and relationship building skills
- Excellent project management skills with ability to prioritize and track multiple tasks
- Must be able to work independently and as a team player.
- Empathy and great active listening skills.
- The ability to think clearly, communicate succinctly, and write well.
- A strong team orientation. A willingness to help other team members grow.
- Problem solver.

Benefits:

- Competitive compensation depending on experience
- Health benefits
- Bonus program
- 401 (k) retirement plan
- A fun and friendly team of colleagues.
- Firm ownership opportunity.

Please email your resume HR@faiwealth.com by copying the contents of your resume into the body of the email. Please include a short introduction and a list of software programs you have used. You may attach the resume as well. Phone calls are NOT accepted.