Visionary Wealth Advisors, LLC is an independent registered investment advisor firm committed to helping clients achieve a future greater than their past.

Visionary Wealth Advisors is seeking a motivated, driven individual to join their team in Jackson, MO. The Wealth Management Advisor is a salary-based position which requires demonstrated competence in the areas of client service and administrative support within the financial services field. This position provides client relationship support through managing and gathering client data, working with clients to resolve issues, and other practice management tasks as needed. Responsibilities include activities related to individuals, businesses and organizations and does not include commissions or cold calling.

This position will consistently follow high standards of business, professional ethics, and legal and regulatory requirements when dealing with others and/or performing work activities.

KEY RESPONSIBILITIES

- Responsible for the management of client relationships. Initiates and facilitates regular contact withclients to build and maintain relationships.
- Responds to client inquiries and manages the resolution of client issues.
- Prepares and processes client deliverables.
- Services clients by collecting and inputting data for financial plans, running scenarios, and closing out plans.
- Prepares and ensures new business paperwork processes successfully which may include preparing forms, obtaining appropriate signatures, preparing documentation, tracking new applications, and coordinating rollovers.
- Runs illustrations, proposals, and other reports for clients as needed. Prepares charts, graphs, tables, and other visual aids to be used in meetings with clients.
- Acts as a liaison to support staff to ensure a high level of assistance is provided to clients and that outstanding service levels are met at all times.
- Under the direct supervisor of the Advisor, completes client trades accurately and efficiently. All trades should be completed in a timely manner to satisfy client need
- Builds and inputs investment models and is responsible for learning and overseeing the Firm’s trading tools.
- Responsible for documenting processes and workflows as needed.

REQUIREMENTS

- Undergraduate degree in Finance, Economics or Business Administration preferred
- Series 7/66 or 65 required or acquired within 6 months of employment
- 3-5 years minimum experience in Financial Services industry preferred
- CFP Preferred or acquired within two years of employment
- Proficient in Microsoft Office Suite
- Ability to work independently on various projects simultaneously
- Strong analytical and interpersonal skills
- Strong time management skills and ability to meet deadlines

- Excellent verbal and written communication skills
- Demonstrated ability to assume additional responsibilities over time

COMPENSATION & BENEFITS

- Base salary
- Bonus structure based on net profit of the practice
- Potential for future partial ownership of the practice
- Employer paid health insurance
- Employer Sponsored Retirement Plan with company match
- Paid time off
- Professional development reimbursement plan to pay for CFP certification

Visionary Wealth Advisors is an Equal Opportunity Employer. Visionary does not discriminate on the basis of race, religion, color, sex, gender identity, sexual orientation, age, non-disqualifying physical or mental disability, national origin, veteran status or any other basis covered by appropriate law. All employment is decided on the basis of qualifications, merit, and business need.

Please contact jana.gregorek@vwa-llc.com for additional information.