CHRISTOPHER STREET FINANCIAL
A BLUESPRING WEALTH PARTNER

OPPORTUNITY

Advisor II | Financial Advisor | Service Advisor

WHO WE ARE

Christopher Street Financial (CSF) is a unique, growing financial planning and wealth management firm based in New York City, with clients nationwide. We offer relationship-based financial planning and investment management. Our purpose is to create opportunities through relationships, helping people lead fulfilling lives. We value this for our clients, for our colleagues, and for our community.

Christopher Street Financial was founded in 1981 as the first company committed to providing financial advice and investment services to the LGBTQ+ community. A lot has changed since the birth of Christopher Street Financial, but one thing has not: our commitment to provide financial planning and investment services to the LGBTQ+ community and those who share our values.

We now serve over 420 households and manage over $900 million in assets. While we are still experts in the unique financial, tax, and legal needs of unmarried couples, as time has gone by, our values and approach to financial planning have resonated with a wider range of people. We provide a welcoming environment where everyone is recognized as an individual with unique needs. By partnering with us as fiduciaries, clients are trusting us with their future and with their peace of mind.

We are an Ensemble Practice, operating as a team that puts our clients and the company before personal interests. Client relationships are relationships of the firm and not of any single advisor. We believe in the efficiency of a common approach and the value of providing a common client experience, all while acknowledging our clients' individuality. We collaborate with one another, combining the strengths of our unique abilities to achieve greatness as a group. We seek to recognize individual efforts based on how they contribute to team success. And together, we are always learning how we can do it all better. This is core to who we are.

WHO YOU ARE

As a **Service Advisor** at Christopher Street Financial, you will be an integral part of our client coverage teams, working with our Senior Advisors in managing client relationships, assisting with client portfolio strategy, and executing on new business opportunities, all the while establishing and maintaining positive working relationships with everyone at CSF.

You must share our passion for serving clients, colleagues, and community. You must embrace working in teams, where everyone is expected to contribute and collaborate.

A successful **Service Advisor** is a self-starter with a demonstrated history of initiative and a strong sense of personal ownership and accountability. We will depend on you to manage client relationships, establishing strong connections with existing clients in addition to establishing new relationships in the pipeline to support the firm's growth.

You will be asked to participate in both firm-wide initiatives and individual, business-aligned goals as we continue to grow and constantly improve how we operate in service of our clients. And should you become part of CSF, you can be confident that you are joining a team that is supportive and which looks for your full commitment, creativity, and insights.

DUTIES AND RESPONSIBILITIES

- Client Financial Planning & Investment Management Execution
  - Explore and define clients' financial objectives and life goals
  - Create and present financial plans and investment recommendations
  - Monitor, review, and revise existing financial plans and investment portfolios based on clients' changing circumstances, needs, and goals, including life events
- Client Meeting Preparation, Execution, and Follow-Up
  - Clearly define and oversee the efficient creation of client deliverables, ensuring deadlines are met in coordination with other team members
  - Document client communications including emails, proposals, presentations, meeting notes, and follow-up activities in a thorough and timely manner
  - Ensure that client requests and meeting follow-up items are documented, tracked, and completed, including CRM workflows in partnership with the Client Services team
- Daily Client Relationship Contact
  - Provide an exceptional client experience
  - Create client relationship strategies in collaboration with CSF team members
  - Develop strong client relationships, understanding and addressing each client's unique circumstances, needs, and goals
  - Effectively engage with clients in virtual meetings, in person, by phone, and through email
  - Clearly explain to clients various concepts, both simple and complex, customizing communication style to match varying levels of financial sophistication
- Business Development Support
  - Serve as a representative of the Christopher Street Financial brand, embodying our Core Values and Core Focus at all times
  - Participate in firm-led initiatives and attend company, industry, and community events in support of business development

    - Participate in the engagement, relationship development, and onboarding of prospective clients
    - Deepen relationships with existing clients, including advising on and consolidating outside assets
    - Serve clients in a manner that is truly referrable, looking for every client to be a "raving fan"
- Advisor Team and Firm Initiative Lead/Participant
    - Role model exemplary behavior in servicing clients, working as a team, and driving positive change
    - Commit to the company's vision according to the EOS framework
    - Help define, support, and advance the company's long-term goals and initiatives
    - Cooperate with everyone across the company, actively collaborating with teams, setting clear expectations, demonstrating personal commitment, and providing constructive feedback

REQUIRED SKILLS AND QUALIFICATIONS

- Four-year college degree, or equivalent work experience
- CFP® designation required or actively in process to be obtained in the next twelve months
- Series 65 or 66 required
- Successful employment history with a minimum of fives years of directly related experience
- Able to present and communicate clearly, logically, and persuasively in person and in writing
- Excellent computer skills (Outlook, Excel, Word, PowerPoint, and Zoom)
- Experience with financial planning software (eMoney preferred)
- Familiarity to CRM systems (Salesforce preferred)
- Must be able to provide proof that you are eligible to work legally in the United States.

CORE VALUES

Team members at Christopher Street Financial:

- Are approachable and even-tempered
- Operate with humility, prioritizing the team
- Are reliable
- Demonstrate initiative with a can-do attitude
- Seek opportunities for growth

COMPENSATION AND BENEFITS

Christopher Street Financial offers market competitive compensation based on professional experience. The salary range for this role in New York City is $100,000 - $135,000. In addition, as a valued member of the CSF team, you are eligible for annual incentive compensation tied to your individual contributions to team success and overall firm performance and growth.

Christopher Street Financial values learning and growth. We invest in every team member's professional and personal development. Our Career Tracks provide opportunities for increasing professional responsibility and reward.

We offer the following competitive benefits:

- Hybrid Work (subject to change)
  - Tuesdays, Wednesdays, and Thursdays are in-office
  - Mondays and Fridays are optional work-from-home
- Paid Time Off – 23 days
- Paid Holidays – 10 days based on the NYSE holiday calendar
- Paid Family Leave
- Medical Benefits – 4 options, including a 100% employer-funded option
- Dental Benefits – 3 options, including a 100% employer-funded option
- Vision Benefits
- Health Savings Account (HSA), Flexible Spending Account (FSA), and Dependent Care Flexible Savings Account (DC FSA), and pre-tax Commuting Benefits options
- Group Life and Disability Insurance options
- 401(k) with up to 3% employer match
- Charitable Giving Match – up to $250 employee-directed
- Education Assistance, for career-aligned training and development
- Additional benefits, including Financial Planning Assistance, Legal Guidance, Estate Guidance, and Identity Theft Assistance

WHAT COMES NEXT

If interested in pursuing this opportunity, please click this link to apply or scan the QR code at the bottom of this posting.

CSF is an equal opportunity employer. We are committed to creating a diverse and inclusive company culture, and we do not discriminate against candidates and employees because of their disability, sex, race, gender identity, sexual orientation, religion, national origin, age, veteran status, or any other protected status under the law.

If reasonable accommodation is needed, please contact Mark Lingenfelter, Director of Employee & Client Experience at mlingenfelter@christopherstreet.com.