Associate Wealth Advisor Job Description

Skygate Financial Group, a growing wealth management firm, is seeking an Associate Wealth Advisor to assist us in our mission of helping clients achieve their financial goals. This is your chance to play a key role in the future success of our fast-growing organization!

Our mission at Skygate Financial Group is to help our clients save and invest for retirement, legacy and other goals. The Associate Wealth Advisor plays a pivotal role in attracting and retaining clients. If you have a relentless, burning desire to succeed as a wealth advisor and share our vision, then we would love to hear from you!

Description

The Associate Wealth Advisor will establish new client relationships in addition to providing advisory services and support to a select group of clients. With financial planning responsibility for the firm's small to mid-size clients, the Associate Wealth Advisor has the opportunity to build an excellent business under the leadership and reputation of Skygate Financial Group.

Responsibilities & Activities

- Develops new client relationships.
- Sources prospective client opportunities by capitalizing on networking and referrals.

- Follows up on firm-generated leads.
- Services and delivers financial planning to client base.
- Assists in research.
- Assists in developing client presentations.
- Services client needs and requirements as determined through client interaction. Proactively communicates with clients.
- Promotes the firm's wealth enhancement and planning services.
- Promotes established investment models and strategies that are suitable for our targeted clients.
- Adheres to all company and industry supervisory guidelines and policies.
- Participates in required meetings, training, and continuing education requirements.
- Assists the Firm's Principal Wealth Advisor as requested.
- Performs other duties as assigned.

Industry Experience Requirements

- Financial planning and/or investment advisory experience, especially working with high net worth clients.
- Active Series 65 or 66 or ability to obtain.
- Life, Health, and LTC Licenses.
- Clean U-4 and U-5 history.
- Certified Financial Planner (CFP) preferred but not required.

Knowledge, Skills, & Abilities:

- Requires:
    - Excellent verbal, written, presentation, and interpersonal communication skills.
    - Excellent relationship management skills.
    - Superior business development skills.
    - Excellent attitude and an extraordinary client service orientation.
    - A genuine interest in serving and caring for clients.

- Excellent organizational and time management skills.
- A burning desire to succeed.
- Proficiency with Microsoft Office Suite.
- Bachelor's degree or higher strongly preferred.

- Attendance is an essential function.
- Salary is commensurate with experience.

We also offer a great working environment in a beautiful and professional office location. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational, and focused on improving our client's lives.

For more information about our company, please visit our website www.skygatefinancial.com .

If you're interested in this opportunity, please send your resume and letter of interest to *Kevin Theissen at kevin@skygatefinancial.com* . Given the high demand for this position, we're only able to contact the most qualified candidates.