

Wealth Advisor

Description:

Financial Freedom Wealth Management Group, awarded the Best Place to Work in 2022 for Financial Advisors, is actively seeking a **Wealth Advisor** to join our growing team. Our firm is comprised of fun, compassionate, community-minded individuals who love being part of a diverse and energetic team. A successful candidate must embody our values of treating all people with respect, never compromising our integrity, delighting our clients, and embracing our team culture. The ideal candidate must also be devoted to our commitment to care deeply about our clients and their financial lives.

Responsibilities & Activities:

- Provide delightful service to current and potential clients through meetings, communication, and account support
- Continue and maintain up-to-date knowledge and training on all programs used for financial planning and research
- Prepare for client appointments and create reports
- Conduct securities-related transactions and help steward client's wealth
- Attend and actively participate in client events and activities
- Build and foster relationships
- Manage client concerns within your client base and assist other Wealth Advisors as needed

Knowledge, Skills & Abilities:

- 2+ years of securities knowledge or sales experience
- Series 7, 66, Life and Health licenses required, or the ability to obtain within 12 weeks
- Obtain or hold Securities and Insurance licenses
- Bachelor's Degree desired but not required
- Exceptional attention to detail
- Excellent attitude and demonstrates a team player mindset
- Excellent organizational and time management skills
- An ability to manage and organize multiple tasks
- Excellent communication (oral and written), interpersonal, and presentation skills
- Proficient with computers
- Willing to train in our Salem office

Benefits include:

- 100% Medical and Vision premium coverage
- Voluntary Dental benefit
- Paid time off
- 10 paid holidays
- Paid sick leave
- Paid maternity and other parent leave options
- Annual bonus plan
- Short-term and long-term disability*
- Life insurance*
- 401k plan*
- Cell phone reimbursement
- Cappuccinos for life!

*Eligible after one year of employment