LJPR
FINANCIAL
ADVISORS

Job Description: Financial Advisor

Listing Info
LJPR Financial Advisors is looking for a Financial Advisor to join our team. In this position you will partner with the client(s) and our comprehensive wealth management team, including attorneys, CPAs, CFPs, and CFAs. This is a client relationship management position. Additional duties include:

- Meeting with clients and updating their personal wealth position.
- Serving as initial point of contact to respond to client financial issues, including tax, financial planning, retirement planning, and estate planning issues.
- Providing excellent customer service and support that includes promptly returning phone calls, e-mailing, updating CRM and cover letters.
- Participate in the acquisition of new clients.
- Promoting the firm to its outside audience of prospective clients.
- Building positive relationships with peers and colleagues, while working effectively with others to accomplish organizational goals.

Responsibilities:

- Responsible for the day-to-day relationship management functions for the assigned clients.
- Research and resolve client issues for clients and prospects.
- Follow all compliance/risk procedures, corporate and industry protocols.
- Ensure that all paperwork, policy and procedures for client requests have been adhered to in order to satisfy compliance requirements.
- Create client reports and spreadsheets as required.
- Create and present financial plans.
- Create and present financial models for clients and prospects.
- Attend LJPR audience-building events.
- Assist in prospect conversion.
- Perform duties with confidence, minimal supervision and sound judgment.

Requirements:

- Experience in finance industry, preferably in fee-only space (wire house experience is fine).
- No book is necessary, but we are interested if you have book.
- Highest personal integrity.
- Professional credential(s) (CPA/PFS, CFP, CFA, AIF)
- Excellent written and verbal communication skills, and knowledge of MS Word, Outlook, Excel and PowerPoint.
- Be able to work in a dynamic, fast-paced environment.
- The ability to learn, digest and apply new information.
- Experience with individual clients and nonprofits.
- Must be organized, detail-oriented, dependable, patient and accurate.

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- Ability to multi-task and prioritize work.
- Excellent interpersonal skills and ability to work within a small team.
- Experience with Salesforce a plus, experience with Portfolio Center or other financial database software helpful.
- Experience on the Schwab, Fidelity and TD Ameritrade platforms helpful.
- Working knowledge of standard office equipment, copiers, scanners and telephones.
- Must demonstrate a positive and professional image at all times.
- At least 5 years of related experience in a similar role is required.
- Perform other duties and responsibilities as assigned.

Please send cover letter and resume to careers@ljpr.com when applying.

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