



Producing Advisor Job Posting

Putting client needs first is deeply rooted in the Bulman Wealth Group culture and at the core of everything we do. If you're a financial advisor who is looking to build your career with an independent RIA firm committed to your success, we have an opportunity for you! We invest in marketing, training, and operational processes that can help you grow with us. This is an opportunity for someone who is dedicated to serving clients, has a desire to be a part of a growing team, and wants to contribute to an amazing firm culture. If this sounds like you, let's talk.

1. POSITION TITLE: Licensed Financial Advisor

2. GENERAL SUMMARY OF DUTIES AND RESPONSIBILITIES

The Producing Advisor will deliver exceptional customer service by performing various industry specific tasks related to assisting individuals with their investment strategies by assessing prospective and current clients' financial situations and making recommendations. This position will interact heavily in person, on the phone, and through written communication; maintaining a strong, client first relationship is expected. The Producing Advisor must have a deep understanding of investment markets, strategies, and legislation to develop comprehensive financial plans maximizing client profitability. The position requires employee to deliver 1:1, small group, and large group trainings and presentations to peers and clients.

3. PRIMARY JOB DUTIES

1. Follow the BWG new business process to guide prospective clients through the Financial Compass Roadmap process
2. Collect and analyze information regarding the client's income, assets, investments, or debts
3. Determine which financial products best meet the client's needs and financial circumstances
4. Advise the client regarding advantages, benefits, and disadvantages of different financial products including income planning, taxes, healthcare, estate planning, and investments
5. Market, service, and promote Bulman Wealth Group's suite of financial products
6. Research financial products and partner with the sales team to discuss advantages and disadvantages of various financial service products

4. SECONDARY JOB DUTIES

- Prepare, present, and implement customized financial plans
- Develop, manage, and retain professional industry related vendor relationships
- Proactively work with operations team, clients, and carriers to resolve issues
- Meet individual annual production goals while contributing to overall annual firm production goals
- Using Bulman Wealth Group's Financial Compass, guide prospective clients through the Retirement Roadmap process
- Complete, process, and deliver client/firm paperwork, as needed

- Record notes from every client conversation in Customer Relationship Management (CRM) database, alert COO or President should issues arise
- Operate with a proactive approach to client related tasks and communications
- Partner with Bulman Wealth Group's operations and sales team for a comprehensive implementation of eMoney; assist in the support and training of the team in its regular use
- Support Client Service Managers in completing and processing client service requests; respond to client inquiries within 24 hours of receipt
- Train and assist clients with using BWG Client Portal
- Perform tasks with specialized attention to sensitive and/or confidential content
- Maintain adherence to all compliance related guidelines
- Stay up to date on industry related trends and legislation impacting financial planning
- Maintain required licensure in good standing

5. SKILLS, KNOWLEDGE, AND ABILITIES

1. Ability to prioritize and manage time
2. Attention to detail and accuracy
2. Consistent follow-through
3. Process driven
4. Excellent communication skills, both written and oral
5. Uses discretion, exercises good judgement, and maintains confidentiality of sensitive information
6. Demonstrates persistence to achieve high quality
7. Strong appreciation for the importance of completing tasks on deadline
3. Strong phone and presentation skills
4. Command of the English language and grammar
5. Experience working in a fast-paced environment
6. Advanced knowledge of computers and G-suite
7. Ability to multi-task

6. PERSONAL SKILLS

- Desire to build relationships with people
- Pleasant disposition
- Confident communicator
- Self-starter
- Customer service oriented
- Desire to work as part of a team
- Strong work ethic

7. MINIMUM REQUIREMENTS

- Series 65 or equivalent licensing, required
- Insurance licensing, required
- 1-3 years experience as licensed financial advisor, preferred
- BA/BS degree, preferred