BERKELEY SEARCH
CONSULTANTS

Title: Financial Advisor
Location: Multiple Locations
Type: Hybrid
Time zone: PST
Compensation: DOE + bonus + equity, etc.
Company: Leading Brokerage Firm (Name Withheld for Privacy)

Exciting Financial Advisor Opportunities – Multiple Locations Available

Our firm is actively seeking experienced Financial Advisors to connect with top-tier financial services firms across multiple locations. We partner with respected firms known for their commitment to excellence, helping skilled professionals like you find the perfect fit for your career growth.

Why Work with Us?

- **Exclusive Opportunities:** Gain access to premier firms looking for top financial talent.
- **Diverse Clientele:** Work with firms serving a range of clients, from business owners and entrepreneurs to retirees.
- **Professional Growth:** Benefit from ongoing career coaching, development programs, and networking opportunities.
- **Competitive Compensation:** Secure roles with attractive salary and commission structures, plus performance-based bonuses.
- **Comprehensive Benefits:** We match you with firms offering health, dental, and vision insurance, retirement plans, and generous paid time off.
- **Flexible Work Environments:** Find a role that suits your work-life balance in desirable locations.
- **Community Engagement:** Work with firms that offer opportunities to participate in sponsored events, volunteer initiatives, and networking functions.

Position Overview:

As a Financial Advisor, you will provide personalized financial planning and investment advisory services to a diverse client base. Your expertise will be instrumental in developing tailored strategies that ensure financial security and long-term growth for clients.

Key Responsibilities:

- **Client Relationship Management:** Build and maintain strong relationships with clients, understanding their financial needs, goals, and risk tolerance.
- **Financial Planning and Advice:** Develop customized financial plans, including investment strategies, retirement planning, estate planning, and tax optimization.
- **Portfolio Management:** Monitor and adjust client investment portfolios based on market conditions and client objectives.

- **Business Development:** Identify and cultivate new business opportunities to expand the firm's client base.
- **Compliance and Ethics:** Adhere to industry regulations and firm policies, ensuring the highest standards of integrity and professionalism.
- **Market Insights:** Stay informed on economic trends, market developments, and investment opportunities to provide expert advice.

Qualifications:

- **Experience:** Minimum of 5 years as a Financial Advisor or similar role in a brokerage or wealth management firm.
- **Education:** Bachelor's degree in Finance, Economics, Business Administration, or a related field; advanced degrees (MBA, CFP) preferred.
- **Licensing:** Current Series 7 and Series 66 (or Series 63 and Series 65) licenses required; additional certifications such as CFP, CFA, or ChFC are highly desirable.
- **Skills:**
  - Proven track record in client acquisition and relationship management.
  - Strong analytical and problem-solving abilities.
  - Excellent communication and interpersonal skills.
  - Proficiency in financial planning software and CRM systems.
- **Personal Attributes:**
  - High ethical standards and commitment to client confidentiality.
  - Ability to work independently and as part of a team.
  - Passion for helping clients achieve financial success and security.

How to Apply:

If you are a proactive and client-focused financial professional looking for your next career move, we can help you find the perfect opportunity. For immediate and confidential consideration, contact Pete Smith at **psmith@berkeleysearch.com**

Partner with us and take the next step in your career today!