Downloaded from <https://www.velvetjobs.com/job-descriptions/advisor-consultant>

# Example of Advisor Consultant Job Description

Our innovative and growing company is searching for experienced candidates for the position of advisor consultant. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for advisor consultant

* Develop strong connections with coordinators/support staff to ensure operational efficiency and execution of program’s marketing plan activities
* Actively participate in Advisor Manager and Regional Program Manager led program marketing consultations
* Respond to phone calls from financial advisors promptly and professionally, following established criteria
* Place supply orders for marketing material
* Follow-up with representatives with answers to questions or to make sure information was received and understood
* Log phone calls into our computer system for tracking purposes
* Act as a liaison between home office and wholesalers in the field
* Assist in the training and development process of new employees
* Once licensed, make outbound phone calls to financial advisors regarding commission specials, new products, marketing ideas, special meetings
* Partner with Advisor Consultant to develop consultative relationships with Financial Advisors, branch office managers and sales managers

## Qualifications for advisor consultant

* Interfaces with internal leaders on dealer contracts and agreements
* Self-motivated team player with a minimum of 3 years of industry experience required
* Knowledge of advisory business, custodial service platforms and brokerage a plus
* 3 to 5 years of experience in a direct financial sales role
* Military education or experience may be considered in lieu of civilian requirements
* Flexible availability to work during “peak” retail hours such as nights, weekends, and holidays (required)