



Example of Advisor Consultant Job Description

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Our company is searching for experienced candidates for the position of advisor consultant. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don't fill all of the qualifications, you may still be considered depending on your level of experience.

Responsibilities for advisor consultant

- Develop tactical consultative relationships with International Financial Advisors (FA), branch office managers and sales managers of priority firms to obtain and grow market share of Nuveen's (and its wholly owned subsidiaries) products and services
- Partner with FA's to understand and grow their business
- In partnership with the Internal Advisor Consultant and Managing Director, engage in continuous territory management by utilizing Advisor segmenting techniques to qualifying Advisors as high, medium, and low Prospects while identifying advisor segments to predict future behavior
- Incorporate data and analytics, including Market Metrics and other key data sources into territory management and execution
- Participate in seminars and roundtables to educate and provide information on financial concepts
- Conduct branch office-wide meetings with FA's to deliver various wealth and practice management related topics to assist FA's in developing their consulting skills
- Develop and maintain relationships with FA's, branch office managers, sales managers, appropriate regional centers of influence, divisional directors/specialist and associated analysts who are influencers on investment decisions
- Document all Advisor activity in SalesPage and update SalesPage/Outlook calendar, and complete Advisor surveys to capture Advisor information

- Partner with Internal Advisor Consultant to capitalize on qualified Advisor leads while providing territory specific information to initiate call campaigns
- Partner with Consulting Service Associate to ensure database integrity of SalesPage, Profiling, Scheduling initiatives, and expense management

Qualifications for advisor consultant

- Over time, master all products and services and develop increasingly specialized knowledge of products and understanding of performance
- Candidate must have broad expertise across AF ISR operations (AF DCGS, AOC, Collection Management, Joint/HQ level staff experience, Reserve/ANG management) and possess the ability to assist in strategic direction and future concept planning
- Entrepreneurial mindset (Self-starter)
- Ability to manage multiple task simultaneously while maintaining attention to detail
- Working knowledge of key business software such as Outlook, Word, Excel, and Access
- Competency and/or experience working with people from diverse backgrounds and cultures