Example of Associate Advisor Job Description

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Our company is searching for experienced candidates for the position of associate advisor. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for associate advisor

- Present recommendations to CPA's prior to their client meetings
- Proactively call clients to deepen business relationships and identify potential opportunities
- Proactively call prospects to schedule appointments with the Financial Advisors
- Research information for client and prospect meetings
- Works in conjunction with the Regional Managers to complete request from financial advisors/independent branch offices
- Ensures documents received from outside offices are in good order and can be processed by Home Office Operations
- Reviews daily notifications from Compliance and Operations then delivers to the appropriate financial advisor for advisement
- Identify private investor prospects, market the firm's financial services and convert prospects to clients with assets under supervision
- Partner with senior advisor to assess functions of the business in an effort to identify areas of opportunity to continuously elevate and grow the business, which includes gathering assets, creating a value proposition for marketing, introducing financial planning and portfolio management
- Develop and service existing client relationships, monitor clients' investment objectives on an ongoing basis, work to win additional available assets under supervision, communicate value of their William Blair relationship

Qualifications for associate advisor

- General financial planning knowledge and working towards a financial planning designation
- Interest or intent to pursue Para Planner designation
- In-depth service skills with a strong commitment to service excellence
- Analytical ability, persistence and an entrepreneurial perspective to build
- Patience, empathy and tact, confidentiality, initiative, ability to work in stressful situations, friendly, outgoing and professional personality, ability to be flexible
- Self-starter who's always looking for ways to help and grow