



Example of Financial Solutions Advisor Job Description

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Our company is looking to fill the role of financial solutions advisor. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for financial solutions advisor

- Minimum of 1-2+ years financial advisory or investment experience experience
- A strong referral network from across the business that will give you a leg-up on client acquisition
- Series 7 and Series 66 (or both the 63 & 65) are required, if series 66 is not held, must be obtained within 90 days
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- Minimum of 1-2+ years financial advisory or investment experience
- Life, Health, and Variable Annuity Licenses required, or must obtain within 90 days

Qualifications for financial solutions advisor

- Opportunities to connect with experts including small business consultants, mortgage lenders and investment advisors
- Is comfortable in a sales role, finding ways to nurture strong relationships with prospective clients
- Likes to learn on your feet, adapting to new information and seeking the right solutions for clients
- Is thorough and will incorporate relevant regulatory due diligence into daily tasks and long-term strategies for clients
- A bachelor's degree, or 1-2 years' experience working in the financial service

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