



Example of Financial Solutions Advisor Job Description

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Our company is searching for experienced candidates for the position of financial solutions advisor. 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 financial solutions advisor

- Series 7, and 66 or equivalent (if not currently held, Series 66 must be obtained within 90 days)
- Strong interpersonal & computer skills with the ability to multitask in a fast paced environment
- Bachelor's degree (business related discipline strongly preferred), or 1-2+ years financial advisory or investment
- Willingness to receive and implement feedback in order to operate in a collaborative team-based environment
- Successful track record of achieving sales goals
- Ability to effectively manage a heavy workload

Qualifications for financial solutions advisor

- Typically at least 5 years of relevant financial planning experiences and post-secondary degree in related field of study or an equivalent combination of education and experience
- CFP designation (IQPF in Quebec), OR PFP or QAFP completion
- Strong working knowledge and ability to be agile to learn advance uses of financial planning softwares
- Deep knowledge and technical proficiency gained through extensive education and business experience

