Our innovative and growing company is hiring for an investment 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 investment advisor

- Document information from conversations in with clients pertinent to business and relationship development to be referenced for follow-up calls
- Sales and Services
- Passion for delivering exceptional client service
- Unprecedented will to strive for excellence in a performance driven environment
- Assisting the client in implementing the strategy through assisting them in building portfolios by providing detailed information and comparisons of investment funds
- Take clients through a profiling and needs assessment process in order to determine appropriate asset allocation
- Accept client trades and instructions over the phone while ensuring these are consistent with client Investor Profile information and adhere to all compliance and regulatory requirements to the highest ethical standards
- Identifying and providing solutions to a wide range of client needs including investments, banking, credit, FX (Foreign Exchange) and wealth structuring (trusts)
- Strong, proven consultative sales skills Negotiation and problem solving skills to identify and address issues
- Research, plan and build community investment partnership plans to assist regional representatives in adding capacity in communities and building long lasting relationships in key regions where we operate

- Annually reviews fees and asset mix for each relationship
- Ensures completion and consistent review of an Investment Policy Statement and Individual Wealth Plan for each relationship
- Accountable for positive net growth in assets under management
- Accountable for referring Investment only clients to Relationship Manager to increase banking and lending product sales
- Uses expense budget appropriately to support Client and business activities
- Records Client correspondence, communications, meetings and sales activity in SalesForce.com as appropriate