Job Opening
Financial Planner/Junior Financial Advisor
New York, New York

Key Responsibilities:

As a Financial Planner/Junior Financial Advisor, you will work closely with a well-established Financial Advisory Team at a major investment and financial services firm supporting the implementation and delivery of financial planning and investment advisory and brokerage services to high net worth prospects and clients. The position requires data gathering, data review, and data manipulation as well as client acquisition and relationship management. The Financial Planner/Junior Financial Advisor will have daily client interaction and some administrative duties.

Position Minimum Qualifications:

- College Graduate with Bachelor of Arts/Bachelor of Science Degree [Finance, Economics and/or Business majors preferred but not required]
- Certified Financial Planner Designation
- Characteristics of the ideal candidate include:
  - Serious and Mature
  - Precise, Orderly and Organized
  - Strong and Flexible Problem Solving Abilities
  - Excellent Project Management Skills
  - Outstanding Analytical Aptitude
  - Comfortable Handling Multiple Work Streams
  - Detail Oriented and Accurate
  - Disciplined
  - Efficient
  - Task Oriented
  - Prompt
  - Neat, Professional Appearance
  - Time Management Skills
  - Team Oriented/Strong Collaborative Inclination
  - Articulate
  - Self-Motivated
  - Adaptive and Eager Learner who enjoys a fast-paced environment
  - Competent Writing skills
- In depth knowledge of word processing, spreadsheet, and presentation software
- High familiarity and comfort with computers and software solutions
Other Details

- Job Type: Full Time
- Job Category: Financial Planning/Investment Advice
- Industry: Financial Services
- Career Level: 3+ years industry experience
- Compensation: Non-hourly Salary and Performance Based Bonus, full benefits, and professional development
- Required travel: Local [Tri-State Area]
- Professional Development Opportunities

Preferred additional qualifications

- Series 7, 65 Licensed
- Strong knowledge and understanding of financial planning process
- Experience in maintenance and growth of affluent client relationships
- Investment and/or Insurance background
- Client acquisition and sales

Send inquiries and resumes to LaRue R. Gibson, Jr. at LaRue_R_Gibson@ml.com.