



Wealth Advisor

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. We are a growing team of seven separated across three business segments: Financial Planning, Asset Management, and Trust Services. We are currently seeking a Wealth Advisor to join our growing Financial Planning division.

The Wealth (WA) is expected to help clients establish financial goals through our financial planning process and assist them in achieving those goals through periodic communication.

Jobs Specifications:

- Utilize financial planning software to develop comprehensive financial plans for clients
- Organize and interpret financial information obtained from clients within the financial planning process.
- Educate clients about the purpose and details of financial strategies/products
- Maintain client base through quality relationship management and build client base through consistent networking
- Periodically contact clients to maintain transparency on the progress of their financial goals/objectives
- Actively support ongoing business development and client service initiatives of the firm
- Remain up-to-date on political, economic, and market news.

Qualifications:

- Certified Financial Planner™ (CFP®)
- Bachelor's degree in business-related field
- Minimum of 3 years of experience within the financial services industry
- Proficient in Microsoft Office and financial planning software
- Up to date knowledge of financial planning topics
- Familiarity with securities, mutual funds, and ETFs
- Analytical thinking skills exemplifying the ability to assess client's needs
- Strong interpersonal skills, exemplifying the ability to communicate with clients and teammates
- Organizational skills to manage multiple tasks

All qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, religion, sex, sexual orientation, national origin, age, disability, protected veteran status, genetic information, marital status, gender identity or any other impermissible criterion or circumstance. Monte Financial Group, LLC also takes affirmative action in support of its policy to hire and advance in employment individuals who are minorities, women, protected veterans, and individuals with disabilities.