Associate Wealth Advisor

Firm Overview

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

Job Summary

The Associate Wealth Advisor is expected to manage client relationships through periodic communication, focusing on the progress of a client's financial goals and objectives established within our financial planning process. The Associate Wealth Advisors is also responsible for developing in-depth investment policy statements and maintaining constant communication with the Asset Management team to ensure the client's investment needs and objectives are being achieved.

Key Accountabilities

- Organize and interpret financial information obtained from clients within the financial planning process.
- Utilize financial planning software to develop comprehensive financial plans for clients.
- Develop in-depth investment policy statements and maintain close communication with Asset Management.
- Periodically contact clients to maintain transparency on the progress of their financial goals and objectives.
- Retention of client base through quality relationship management
- Grow client base through new opportunities with existing clients and center of influence referrals.
- Monitor industry and regulatory updates, the economy and financial markets, and fraud and cybersecurity threats.

Qualifications

- Demonstrate emotional intelligence to help clients accomplish their goals through all life stages.
- An active listener and communicator who connect easily with people and build trusted, lasting relationships.
- Have advanced analytical skills with strong attention to detail, accuracy, and deadlines
- Exhibit a fiduciary mentality and maintain confidentiality in all matters.
- Exemplify organizational skills to manage multiple tasks
- Are dedicated to a career as a Register Investment Advisor

Education, Experience, Licenses & Designations

- Certified Financial Planner™ (CFP®) or progressing toward certification
- BA/BS degree
- Minimum 2-3 years of experience within the financial services industry
- Proficient in Microsoft Office and financial planning software

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.