FAIRPORT WEALTH

Leonetti & Associates

ADVISOR

Location: Buffalo Grove, IL

Benefits: Yes

Status: Full-time

JOB DESCRIPTION

Fairport Wealth: Leonetti & Associates is looking for an Advisor responsible for providing our high standard of client experience and Inspiring Families. The Advisor will be responsible for providing holistic wealth management solutions to clients and their families. The Advisor will have primary client relationship responsibility, along with serving as the second chair on additional client relationships.

DUTIES AND RESPONSIBILITIES

- Strives to understand clients' goals and objective in order to develop personalized, comprehensive financial solutions to help achieve the outcomes client's desire.
- Actively engage with clients to update goals, objectives, and implement appropriate recommended solutions.
- Client meeting preparation.
- Proficient in running and managing client meetings
- Establishes and maintains a service delivery schedule for clients
- Provide guidance and solutions for the individual planning needs of clients in the areas of insurance, retirement planning, estate planning, business planning, education funding, investment management, and tax planning.
- Works closely with the Investment Team to develop an investment strategy to help meet long-term goals and objectives.
- Willing to participate in firm growth initiatives including support of our target market outreach and identifying, exploring and closing share of wallet opportunities with existing clients

QUALIFICATIONS

- A four-year degree, with a professional designations a plus (CFP, CPA, etc.) preferred
- A minimum of 5 years of experience in the financial services industry in a client relationship position
- Excellent written and verbal communication skills, as well as interpersonal skills
- Ability to operate independently in dealing with broad concepts and to effectively manage multiple priorities
- Deep knowledge of various investment and financial planning topics and a commitment to client service.
- Proficient in the use of client relationship management and comprehensive financial planning software and technologies. Experience with eMoney, Orion, and Salesforce preferred, but not required.
- A growth mindset with a commitment to lifelong learning and sharing.

KEY COMPETENCIES

- Consistently embodies and lives out our core values - empathy, team over self, engaged, initiative and continuous improvement
- A willingness to support and/or mentor colleagues
- A willingness to be visible in the communities/niches we serve and/or in other industry opportunities
- Client service
- Participation and teamwork in conjunction with corporate initiative