Firm: Bogart Wealth

Position: Financial Advisor

Location: The Woodlands, TX

JOB DESCRIPTION

Overview:

As a Financial Advisor you will embrace technology, enjoy a collaborative environment, and hold in high regard serving clients in a fiduciary capacity. You will work with additional team members, providing financial planning, investment advisory support, and facilitate business development initiatives.

Responsibilities:

Our Financial Advisor will be a team player and methodical business leader, working closely as a trusted advisor serving the sophisticated needs of high net worth individuals and families. You will build rapport and establish relationships with existing and target prospects, convert them to clients and facilitate them through our financial planning process. In addition, as a member of our planning team, you will contribute to our business development and marketing efforts. More specifically, you will:

Facilitate Business Development

- Leverage local centers of influence to extend our referral network while continuously looking for opportunities to establish relationships with potential prospects, clients and strategic partners
- Participate in the design and execution of key marketing initiatives, facilitating client involvement
- Represent the organization externally by attending and/or presenting at client and alliance events

Provide a Superior Client Experience

- Manage the relationship and client experience from the beginning of engagement throughout the initial planning process
- Work with the planning team to develop financial strategies designed to meet the specific needs and concerns of our entrepreneurial clients
- Maintain a pulse on every client, staying a step of ahead of their needs and exceeding their expectations
- Own the organization's value proposition and its matriculation through the client experience

Lead the Best Advisory Process

- Serve as an integral member of the organization's financial planning team; staying on the forefront of key financial, investment and risk management concepts and providing mentorship and education to prospects, clients, alliances and team members
- Provide daily support to the Financial Planning Team, conducting financial planning research and assisting in the preparation of customized comprehensive financial plans and portfolios for clients
- Coordinate client service needs with internal and external team members
- Memorialize client meetings and providing support to the overall client experience
- Gain an understanding of the investment strategy of the organization
- Direct and monitor workflows required to provide an exceptional client experience
- Stay current on products, services and regulations that could impact our clients

Qualifications:

- Bachelor's degree, preferably with a concentration in Business, Economics or Financial Planning
- 8+ years of experience with advanced planning
- **CFP® designation is required**
- **Business development experience required**
- Strong entrepreneurial spirit with a high level of persistence
- Foundational knowledge of key financial, investment and risk management concepts
- A passion to help clients achieve their goals
- Demonstrated analytical and problem-solving skills
- Strong attention to detail, and exceptional follow through
- Outstanding communication and relationship building skills
- Excellent project management skills with ability to prioritize and track multiple tasks
- Empathy and great active listening skills
- The ability to think clearly, communicate succinctly, and write well
- Fundamental knowledge and hands on experience working with eMoney

Benefits:

- Competitive compensation depending on experience
- Health benefits
- A bonus program
- A 401 (k) retirement plan
- A fun and friendly team of colleagues