Wealth Advisor Trainee

Job Type: Full-time

Year 1: Wealth Advisor Trainee – up to $36,000 ($24K base salary + potential bonus of $12K)

Year 2: Wealth Advisor Trainee – up to $60,000 ($36K base salary + potential bonus of $24K)

Years 3+: Wealth Advisor - Up to $100,000

Have you ever thought about a career in the Financial Services Industry? Did you just graduate with a Business, Finance, Economics or Marketing Degree? Or maybe you took a few months off after graduating and are now ready to embark on an amazing and rewarding career? Imagine how it would feel to be part of truly helping people live life to the fullest - knowing that their financial planning needs are completely taken care of! This is a phenomenal opportunity to join a growing 21st century financial advisory firm and begin your career in an entrepreneurial, best-in-class environment. We strive to provide a professionally intimate client experience and it will take a special, hard-working and client focused employee to join this growing team, and succeed.

Great Lakes Wealth is a wealth management and investment advisory firm based in Northville, MI. We work with a select group of clients and have an over-arching objective to help manage and preserve our client's wealth. Our commitment is reflected in everything we do - the connected relationships we build, the disciplined planning process we apply and the concierge-level of attentive service we provide. We bridge Wall Street investments with Main Street Values and we bring common-sense investing to a not-so-commonsense world.

Months 1-6: You begin as a Client Services Coordinator & Administrative Assistant

You will be responsible for all aspects of the front office, including but not limited to:

- Client Service : Be the initial point of contact for all client service needs; in person, over the phone and email. Facilitate client service needs in a timely manner. Lead scheduler.
- Records Management : Maintaining organized virtual files for client, practice and facility information as needed. Includes scanning, shredding and filing.
- Meeting Preparation & Follow-Up : Review and update client information. Prepare meeting agendas, charts, graphs, tables and other visual aids to be used in client meetings.
- Business Tracking : Implementation of service delivery systems. Submit and track business. Track and verify completion of client related requests and tasks.
- Study:** Complete coursework and successful completion of Series 65 exam

Months 7-12: Relationship Advisor

The successful candidate will be mentored by and report directly to upper management and as the successful candidate gathers knowledge and experience as a CSC and passes the necessary licensing (Series 65), the role will then include the following:

- Develop and implement annual marketing plan to meet client acquisition goals
- Prepare preliminary financial planning recommendations and review/edit them for accuracy and completeness
- Prepare initial product solutions and illustrations for advisor review and use in client meetings
- Prepare reports, charts, graphs, tables and other visual aids to be used in implementation meetings with clients
- Maintain client contact during the financial planning process. Answer questions and provide readily available information to clients, if requested, as it relates to servicing their accounts
- Develop portfolio/robust product solution recommendations that will fit the client's risk tolerance and time frame as well as develop appropriate product deliverables
- Review and update client information as needed for client review meetings. Attend and participate in client meetings if necessary
- Manage and resolve client service problems
- Act as a technical resource and provide training and support to other practice members

Months 13-24: Associate Wealth Advisor

After successfully completing the role of Relationship Advisor a successful candidate will move on to the role of Associate Wealth Advisor.

Key traits of a successful Associate Wealth Advisor are:

- High degree of ethics and integrity
- Hard working with a "can do" attitude
- Direct attention to detail and organization
- Effective communication with clients and other advisors/staff
- Effective and efficient time management
- Polite and clear phone manners
- Ability to multi-task
- Positive attitude and sincere willingness to constantly learn and grow
- Initiative coupled with commitment to the team and practice vision
- Analytical ability, persistence and an entrepreneurial perspective to build a client base.

Education Requirements and other designations:

- College degree or higher in business, finance, economics or marketing
- Already obtained or be able to study for and pass the Registered Investment Advisor exam (Series 65)

- Already obtained or has future interest in completing either the Certified Para-Planner or the Certified Financial Planning designation

NO PHONE CALLS /NO RELOCATION PROVIDED ABIILTY TO PASS A BACKGROUND AND FINGERPRINT CHECK REQUIRED

Average Expected Income Statistics

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- Year 2: Wealth Advisor Trainee – up to $60,000 ($36K base salary + potential bonus of $24K)
- Years 3+: Wealth Advisor - Up to $100,000

We strongly urge you to contact us at management@greatlakeswealth.us