

FINANCIAL PLANNER

What Makes This Great Opportunity Different?

- Unlike most “Advisor” positions, no prospecting is required! We will put you in front of highly qualified prospects every week!
- Additional prospective clients for you through our established Tax Practice
- We have developed a nationally used Holistic Planning Process that works for you
- High-quality training, mentoring and professional development program
- Leading industry products and solutions built on an integrated technology platform
- First Year Income Potential 80-100k, 2nd Year 150-200k, 250k then after

Full-time opening with The Chamberlin Group (Des Peres, MO), an established and growing Tax and Financial Planning company. Accepting applications for Financial Planners who will build long term client relationships, helping them achieve their goals through comprehensive Financial Planning. We welcome you to a team of ***diligent and pragmatic professionals***.

The Financial Planner position is sales-oriented, client facing and a critical part of our team. The Planner must communicate effectively with all areas of the business to ensure excellent service is provided to our clients. It's important that the person we choose will be a “fit” with our commitments and shared values. If you or someone you know would like to work with a ***team that works together, values each other, and shares a mission of serving others***, please read on or share this.

ABOUT OUR COMPANY

The Chamberlin Group was founded in early 2002, bringing 30+ years of tax and financial experience to our community. Facing the final year of a three-year market downturn, a necessity to provide more comprehensive planning and protection from economic disasters arose. Holistic Planning was born, putting the desires and dreams of main-stream Americans first. Among others, we serve people who are of retirement age and are transitioning from working to retirement. We believe in doing thorough research into your individual objectives and goals—customizing a Holistic Financial Plan for your family encompassing, Tax, Estate, Insurance, Longevity and Income Planning.

KEY RESPONSIBILITIES:

- Use our leads and yours to teach and convert prospects into clients
- Teach and facilitate group educational workshops and webinars
- Maximize relationships, create referrals and referral partnerships
- Schedule appointments with prospects, clients, and other Planners
- Meet with current clients 1-2 times minimal per year to review plans and make adjustments accordingly
- Enter and update client information in our CRM database, complete administrative paperwork to fulfill client needs
- Learn and follow our fee planning process, strategies, and philosophies, working collaboratively and respectfully with other Firm Planners and team members
- Will have access to a host of tools, resources and training to develop and grow your client base while sharpening your skills

This Company Describes Its Culture As:

- People Oriented – supportive and relationship-focused
- Innovative and willing to take risks
- Confident and growth-oriented
- Results driven with a strong performance culture
- Detail-oriented with a focus on quality
- Most importantly, we like to have FUN!

REQUIREMENTS:

- Investment industry experience is required. Experience with insurance and/or annuities is a plus
- Prior designations and licenses preferred: CFP, Life and Health, Series 7,65,66 etc.
- This position requires Insurance and series 65 licensing to be obtained within the first 90 days of hire, if not already licensed
- A college degree is a plus, but not as important as investment industry experience
- Ability to pass drug screening and background checks

SCHEDULE:

- Typical business hours, flexible depending on clients' needs
- Some evenings and Saturdays
- Work from our office in Des Peres, MO
- Working remotely optional

COMPENSATION:

- We offer one of the most flexible and competitive compensation plans available

TO APPLY:

Please click [here](#) to upload your resume and **cover letter** to arrange an interview. All resumes with cover letters will be reviewed. reena@chamberlin-group.com

Visit our web site: www.chamberlin-group.com