

**FINANCIAL ADVISOR**

**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 for you to grow**
* **Leading industry products and solutions built on an integrated technology platform**

Full-time Financial Planner opening with The Chamberlin Group (Des Peres, MO), an established and growing Tax and Financial Planning company.

The Financial Planner position is sales-oriented and client facing, allowing you to build rapport and strong relationship with our clients. You 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, Retirement 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
* 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 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
* Most importantly, we like to have FUN!

**REQUIREMENTS:**

* Investment industry experience is required. Experience with insurance and/or annuities is a plus
* 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

**COMPENSATION:**

* We offer a monthly Salary during initial 6 - 9 months of training and a Lucrative Commission Plan thereafter

**TO APPLY:**

Please email your resume and ***cover letter*** on [**marianne@chamberlin-group.com**](mailto:marianne@chamberlin-group.com)to arrange interviews.

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