Seeking an experienced financial advisor

ABC Financial Services, LLC is an established financial advisory firm serving clientele in the southwestern United States from our main office in Scottsdale Arizona. We are in the family wealth management business focusing on high net worth individuals, families, and business owners. Through a planning process built on integrity, knowledge, and attention to every last detail, we seek to guide and inform our clients to successfully navigate the various phases of financial and wealth management. We have been serving this area and market niche for over 25 years and we have a constantly evolving secession plan in place to ensure that will be here 50 years from now.

This is a special opportunity unlike most in the financial services industry. First, our firm is completely independent, so our loyalty belongs exclusively to our clients. Second, we offer a competitive compensation structure (salary and a bonus) and an equity ownership track for employees who demonstrate hard work and leadership characteristics and support the long term goals of our firm. You will be a member of a collaborative and supportive team of strong individuals, all working hard to help us grow a successful and multi-generational business. At ABC Financial you won't “own job” or be building your own practice; this is not an eat-what-you-kill position, and we're not that kind of firm. If you are a financial advisor with [#] or more years of experience and an established client base, we encourage you to contact us and explore an opportunity with our firm. All inquiries will be held in strict confidence. At a minimum, candidates should be able to bring the following assets to the firm:

* [$] assets under management
* [#] years of experience working with high net worth individuals/families and business owners
* Awareness of financial planning issues related to managing wealth
* Bachelor's degree and series 65 / 66 or CFP designation
* Familiarity with portfolio management, including tactical asset allocation, traditional and nontraditional asset classes, and various investing styles is a minimum requirement. We prefer sophisticated estate planning, tax planning, education planning, and insurance planning knowledge, as well as strong knowledge of the stock market and macroeconomic trends.
* Attention to detail; strong organizational skills; ability to complete work in a timely, accurate, and thorough manner
* Must be personable and punctual, and a problem solver
* Clean disciplinary record
* Advisors who meet the above criteria may inquire confidentially about this opportunity by submitting a cover letter and resume to HR manager at ABC Financial.

Source: pp97,98. “Succession Planning For Financial Advisors” by David Grau, Sr.