Affiliate Advisor – Advisor Square Financial

Financial Planner

Red Wing, MN

Advisor Square Financial is a family-owned business serving our local communities of Red Wing and Winona for over 80 years. Our knowledge and experience allow us to help clients make sound investment and lifestyle decisions that positively impact their financial goals. For more information, please visit us at www.advisorsq.com.

You will be a great fit if you have an entrepreneurial mindset, enjoy working with people and data in a dynamic, fast-paced environment. We work diligently in service to our long-standing client relationships. Your friendly, outgoing personality and attention to detail will help you to thrive in an environment working on and in the business at the same time.

Position Responsibilities

- Assist client with all aspects of financial planning including estate management, taxes, income planning, risk management, or other financial goals
- Cultivate existing client base and build long-standing win/win relationships while nurturing current clients to maintain and grow relationships
- Develop full scope financial plans to include retirement accumulation and income streams, college funding, debt elimination, mortgage analysis, budget planning, pension maximization, estate planning and more
- Work alongside lead advisor to understand individual client needs and preferences to ensure a personalized plan unique to their financial goals
- Work alongside lead advisor to create presentations and prepare materials for prospective client meetings, onboarding and servicing of new and existing relationships
- Strong written and verbal communication skills with the intent to share thoughts and processes with co-workers for client needs and cross-training purposes
- Comply with industry rules and regulations

Required Skills and Experience

You will be a great fit if you are entrepreneurial minded, client centric, and a team player. We always strive to provide over-the-top customer service and maintain a professional demeanor.

- 2+ years of experience as a financial planner
- Willingness to obtain CFP® or other equivalent designation
- Strong communication, negotiation, and presentation skills
- Series 7 and 66 and Insurance License
- Good compliance track record

Disclaimer: This job description is only a summary of the typical functions of the job, not an exhaustive or comprehensive list of all possible job responsibilities, tasks, and duties. Responsibilities, tasks, and duties of the jobholder might differ from those outlined in the job description and other duties, as assigned, might be required.

Location: Red Wing, MN
Job Type: Full-time
Pay: Based on qualifications