Financial Planner

ANF Office: *130 Cheshire Lane, Suite 150, Minnetonka, MN*

About AdvisorNet Financial

AdvisorNet Financial has been an innovative leader in the financial services industry for over 60 years. We provide the services and support independent financial advisors rely on to operate their firms efficiently and competitively. Over the years we have developed a vast network which allows us to provide our 300+ independent advisors access to the support services and industry partners that advisors in large institutions enjoy without having to be part of a large institution. For more information, please visit us at www.advisornet.com.

You will be a great fit if you enjoy working with people and data in a very dynamic, fast-paced environment. Our group requires people to be friendly, outgoing, and to thrive in an environment working on and in the business at the same time.

Responsibilities

The Financial Planner is responsible for nurturing an existing client base. The Financial Planner will bring an established and impressive track record, practical experience in personal financial planning and the desire to deliver best in class services to the clients of AFP.

Key Areas of 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 and ask for referrals from existing client base
- Work alongside Executive Planner and/or Financial Planner to understand individual client needs and preferences to ensure a customized plan unique to their financial goals as it related to debt analysis, cash flow, insurance, investment, and tax/estate planning
- Work alongside Executive Planner and/or Financial Planner as needed to onboard and service new and existing relationships
- Willingness to work as a team member and skill builder to fellow team members
- Comply with industry rules and regulations

Qualifications

You will be a great fit if you are entrepreneurial minded, client centric, and team player. We always strive to 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.

Job Type: Full-time

Pay: $45,000.00 - $70,000.00 per year