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| A picture containing text  Description automatically generated | **Director of Advisor Experience** |
| *(full-time, regular employment)* |

**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've 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](http://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**

***Overview:***

As a member of the Relationship Management team, you work closely with our advisors to develop and execute the Company’s strategy. This individual will be a primary advisor relationship, business strategy, circle of services liaison, and trusted partner for our advisors.

Our goal is to ensure the advisor sees and feels the value proposition of AdvisorNet Financial. The right candidate is a strong leader, energetic, strategic thinker, well-organized, and possesses relationship management skills.

**Key Areas of Responsibilities:**

* Responsible for building, developing, and managing new and existing relationships with advisors.
* Deep understanding of what advisors look for in transitioning their practice to a new firm.
* Serve as a creative thinker who can anticipate obstacles and generate solutions to drive outcomes.
* In collaboration with Marketing and Recruiting, coordinate and attend local events put on for our advisors.
* Organize and produce metrics to determine advisor segmentation strategies and implementing consistent communications.
* Manage the events calendar to ensure opportunities for advisors to engage with AdvisorNet and other advisors.
* Work with Recruiting and Relationship Management to ensure an excellent experience for discovery and re-discovery days conducted for recruits and existing advisors.
* Manage advisor database and ensure AdvisorNet is delivering on their service level agreement.

**Qualifications**

* Bachelor’s Degree
* 5+ years of an advisor or client-facing servicing role experience
* Financial services industry experience, preferred
* Series 7 and 63 or willing to obtain
* Salesforce or other CRM database experience
* Data analysis and reporting experience
* Strong communication skills
* Ability to build external and internal relationships
* Problem solving skills that identify issues, analyze, and develop actionable recommendations
* Customer service focused
* Willing to travel 10-20% - primarily locally to advisor offices

*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.*