FAI
WEALTH MANAGEMENT

Lead Financial Advisor/Planner

FAI Wealth Management is looking for an experienced Advisor to join their team. This position requires the following: Proactively guide high-net-worth clients in the financial planning areas of retirement income, estate, college funding, tax strategy, insurance, investments, charity, and more. Perform a wide range of planning, education, research and analysis duties for both existing and prospective investment and financial planning clients. Continuously learn the latest developments in all areas of financial planning. Manage a small staff of Associate Advisors. The position is servicing an existing book of business, so no requirement to sell or bring a book of business with you. Minimum requirements are 5+ years of financial advisory experience, supervisory experience, CFP® preferred.

Minimum Requirements:

- English speaking
- 1-3 years' experience in financial planning
- Intermediate experience in Office, CRM, and document software
- Team-player
- Creative
- Tech and Social Media Savvy
- Values work-life balance
- Client-Centered
- Positive/Optimistic
- Inspiring
- Leader
- Continuous Learner

Compensation/Logistics/Perks:

- Full-time position
- Salaried
- Incentive Compensation
- Retirement plan provided
- Health benefits plan provided
- 10 Holidays and minimum of three weeks paid time off

**Possible ownership potential for the right person.

How to apply?

Please email your resume HR@faiwealth.com by copying the contents of your resume into the body of the email. Please include a short introduction and list of software programs you have used. You may attach the resume as well. Please also provide either your current compensation or your required compensation in the e-mail. Phone calls are NOT accepted.

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