

Eley-Graham Financial Advisory Services
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Merrillville, Indiana 46410
Email resume to: LBernstein@egfas.com
Attention: Lee Bernstein (Ms.), Business Manager

www.egfas.com

Facebook: <https://www.facebook.com/EleyGrahamFinancial>

Apply through Monster.com: <http://jobview.monster.com/Junior-Financial-Advisor-Job-MERRILLVILLE-IN-139938178.aspx>

Junior Financial Advisor

Status: Exempt, health insurance and profit sharing benefits available. Two weeks paid vacation after first full year.

Reports to: President, Senior Advisor and Business Manager

This is a summary outline of the responsibilities initially required of a Junior Financial Advisor for Eley-Graham Financial Advisory Services. This description may be modified as necessary or appropriate and does not constitute a contract.

A Junior Financial Advisor is an integral part of the organization. With financial planning responsibility for the firm's clients, a Junior Financial Advisor learns to be an advisor-- first, by assisting in building the business while allowing the Senior Advisor to focus on advising the clients. A successful Junior Financial Advisor may then move up to advising clients, dependent on licensing, experience and expertise.

SUMMARY OF ESSENTIAL DUTIES

A Junior Financial Advisor supports the firm's Financial Advisory Team (Certified Financial Planners®) by providing assistance with a variety of tasks so the advisors are more efficient and focused on business development and professional responsibilities. Specific areas of responsibility include, but are not limited to:

PLANNING SUPPORT

- Oversee and support staff in pre-client-meeting preparation and post-client-meeting processing work as well as do the work personally
- Attend client meetings; take, assemble and transcribe notes relative to action items, tasks and decisions made during appointments.
- Assist with signature collection from clients, copying of documents or other tasks required during client meetings
- Monitor and follow up with all action items from client meetings
- Monitor and follow up with all work related notes with members of staff, reps or clients
- Schedule client appointments according to work or Advisory Report mailings
- Calendar, confirm and start appointment preparation for each client appointment set
- Manage and oversee Estate Settlement issues as necessary

- Be able to maintain a flexible weekly work schedule, **which will include working evenings as needed and may include an occasional weekend day.**

ADVISORY OPERATIONS SUPPORT

- Update asset values and run reports from database
- Assist Operations Manager where needed, have a strong desire to learn the operations aspects of the organization

GENERAL SUPPORT

- Assist with document scanning
- Maintain client files in appropriate order
- Respond to client inquiries and assist with client request to provide the highest level of client service
- Maintain appointment calendar according to Planner's protocol
- Assist with answering telephones when needed
- Assist Business Manager when needed
- Assist with answering client questions when needed
- Assist with workshops, seminars and client educational events

MINIMUM REQUIREMENTS

- Bachelor's degree required
- Series 7 and 63 required
- Insurance Certification preferred or a strong desire to obtain Insurance Certification
- Licensed or enrolled in Certified Financial Planner® program a plus – if not licensed or enrolled, must want to become a Certified Financial Planner®
- Excellent written and verbal communications skills; strong typing and note taking skills, including being able to transcribe client meeting notes efficiently and accurately
- Superior customer service skills
- Advanced level computer skills; strong knowledge of Microsoft Office Suite
- Exceptional organizational skills; ability to multi-task in dynamic environment
- Comfort with being a "team player" and doing whatever is needed, big or small
- Able to manage and get along with diverse personalities
- Professional appearance and demeanor
- Well-developed interpersonal skills
- Attention to detail with a perfectionist's eye
- Successful sales experience a plus
- A willingness to succeed!

ESSENTIAL MENTAL FUNCTIONS

- Impeccable ability to maintain confidentiality and integrity
- Exemplary planning and organizational skills; efficient multi-tasker
- Effective follow-up, deadline focused
- Ability to pick up new computer programs quickly
- Detail oriented with high degree of accuracy

- Energetic, eager to learn, willing to cooperate
- Self-motivated with ability to work independently as well as under direction
- Positive, cooperative attitude is a must

ESSENTIAL PHYSICAL FUNCTIONS

Ability to sit for extended periods of time working on computer

Ability to communicate via phone with clients and vendors

EQUIPMENT USED

Constant use of computer and telephone

Principia dbCAMS database

Use of office equipment, including copier, fax, scanner, shredder, etc.

ADDITIONAL COMMENTS:

Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time.