PASSAGE WEALTH™
Live your legacy.

Associate Wealth Advisor

Organization Overview

Passage Wealth is an independent financial services practice located in Hoagland, IN. We are one of only ~25 practices nationwide to be part of the newly created Thrivent Advisor Network, a Registered Investment Advisor. This modern affiliation approach allows us the greatest flexibility to meet our client's needs. At Passage Wealth, we act as a reassuring guide, building authentic, faith-based relationships that help our clients open doors and unlock their financial potential. We take a broad-based approach to helping them achieve their financial goals by analyzing their current situation, developing in-depth financial programs, and helping them to implement an integrated financial strategy.

Position Summary

The Associate Wealth Advisor will be joining a well-established practice and would work directly with existing clients as well as developing their own new client relationships. A successful candidate will develop and maintain long-term relationships with clients by gathering data, developing financial analysis, and providing recommendations based on the client's needs. They will identify risk management, financial planning and investment strategies while collaborating with team members and external providers to find and implement solutions. The Associate Wealth Advisor would work independently to organize and manage a wide range of client activities which include, but aren't limited to the following:

- Provide client relationship support through managing/gathering/analyzing client data and helping to prepare preliminary financial plans and other client deliverables
- Serve as case-manager in client meetings. Attend, document, and participate in client meetings and follow-up on meeting action items. Delegate non-advisory follow up work to the client relationship team.
- Help guide individual and block trading of client's accounts
- Research and make suitable recommendations on client investments which align with their risk tolerance
- Support client relationships and respond to client requests
- Analyze information and evaluate results to help choose the best solutions and solve problems

Qualifications

- Obtain Series 65 and Life & Health Licenses (possibly Series 7) within 3 months of hire date.
- Bachelor's degree in related field
- Willingness to work as a team and support other team members.
- Strong emotional intelligence and analytical thinking skills
- Sharp focus on attention to detail & time management
- You must have the ability to speak face-to-face with clients and exceed client expectations
- Excellent communication abilities including writing, speaking, and active listening
- Ability to identify, meet, and follow through with client's needs
- Must be a self-starter and a problem solver