JUNIOR FINANCIAL ADVISOR

ABOUT THE FIRM:
Connecticut Wealth Management, LLC is a Registered Investment Advisor offering planning and asset management to high net worth individuals across Connecticut and nationwide. We take pride in our independent business model that aligns our interests with those of our clients. We are committed to helping our clients turn life's aspirations into financial realities and to creating a collegial, fun work environment where team members are passionate about their careers and can maintain an appropriate work/life balance.

ABOUT THE POSITION:
This is a great job for a recent graduate interested in a career in financial services. It is **not** restricted to economics or finance majors - what we want most of all is a smart, focused person who wants to work on a team in a supportive and often fun atmosphere. We are seeking someone who wants to learn and who is able to interact well with our clients.

The immediate and predominant responsibilities of a junior financial advisor are to provide operational support to a team of advisors and their client relationships. These tasks would include but are not limited to:

- Preparing agendas, reports and paperwork for client meetings, etc.
- Completing and managing investment related paperwork, inputting meeting notes into database, drafting follow-up letters, and facilitating all follow-up tasks from meeting.
- Collecting and inputting data into financial planning software.
- Monitoring client portfolios.

As a junior advisor becomes more familiar with how Connecticut Wealth Management operates and learns the various aspects of financial planning, this person will inherit more responsibility. The role of a junior advisor does NOT include any type of sales calls or business development.

QUALIFICATIONS:
As the next long term contributor to our team's success, this candidate for the position must be motivated and detail-oriented with an ability to multitask and prioritize. Further, a candidate should have strong interpersonal skills with an aptitude for clear articulation in both speaking and writing and should exhibit a strong inclination for top-tier client service. *A candidate does NOT have to have a finance background or experience in the industry to apply.*

EDUCATION:
Bachelor's Degree from an accredited college of university
Demonstrate desire or progress towards CFP® or PFS

CONTACT INFO:
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