Northwestern Mutual
Ascend Wealth Management

Job Title: **Associate Lead Advisor**

Location: Overland Park, KS

Overview:

The Associate Lead Advisor will work closely with the Ascend Wealth Management financial planning team in Overland Park, KS. This is a client-facing role that requires significant interaction with clients and prospects on a daily basis. The Associate Lead Advisor will be responsible for developing a personal marketplace in addition to engaging with existing clients of Ascend Wealth Management. Additional responsibilities include phoning, conducting approach and review meetings, identifying client needs, and moving clients and prospects to take action. The Associate Lead Advisor will also be responsible for post-meeting follow ups, documenting client interactions, and creating/updating financial plans.

Responsibilities:

- Build Relationships with New and Existing Clients
- Complete Meeting Preparation and Follow Up
- Move Clients to Execute on Recommendations
- Develop Personal Marketplace and Obtain New Clients
- Acquire a Deep Level of Knowledge on Financial Planning Concepts and Product Offerings
- Assist in Formulating Planning Recommendations

Qualifications:

- Bachelor's Degree in relevant field of study preferred: Financial Planning, Finance, Accounting, Economics
- Pass Life & Health Insurance License exam within Three Months of Employment
- Pass SIE, Series 7 & 63 exams within Six Months of Employment *(fully sponsored by AWM)*
- Working Toward Obtaining CFP® certification within First Two Years of Employment *(fully sponsored by AWM)*
- Demonstrated Ability to Persuade

Why Ascend Wealth Management:

- Employer-subsidized Health Insurance
- Employer-paid Vision and Dental Insurance
- Employer-paid Life and Long-Term Disability Insurance
- 401(k) with Employer Matching Contributions, potential Profit-Sharing Contributions
- Semi-Annual Community Service Days
- Employer Sponsored Continuing Education and Professional Development
- Competitive Base Pay with Personal Development Bonus and Team Bonus Potential

Submit résumé to Katherine Barnard CFP®, RICP®, Chief Operating Officer: **katherine.barnard@nm.com**