Job Description

Financial Advisor - Wealth Management - Wealth Adviser - Relationship Manager - Private Wealth Client Advisor - Private Client:

Financial Advisor:

We are a regional multi-disciplined benefit, risk management and wealth management firm based in Tulsa, OK. The Financial Advisor role is an excellent opportunity for individual growth and development and to be involved in the continual growth of the firm creating and building client relationships. This is a newly created role due to continued growth.

The Wealth Advisor acts as a trusted advisor for PCP Client Relationships and will work within Premier Wealth Advisors, our wealth management division partnering with our team to best advise and manage client assets and provide multi-disciplinary wealth planning.

Additionally, the Financial Advisor is responsible for developing a comprehensive personal and financial wealth profile and working with our team and strategic resources to implement a plan. As an integral part of the wealth management group, the financial advisor will focus on business development duties both internally and externally. Time will be spent creating and executing business development strategies to attract and retain new generations of asset allocation and financial planning clients. The Financial Advisor will create and assist in creating financial plans for clients in the areas of investment, tax, retirement, education, insurance, and estate planning.

Responsibilities:

- Development of a comprehensive personal and financial wealth profile on the client and the clients' family including identification of wealth related goals.
- Handles clients' inquiries and requests. Be the primary point of contact for the clients assigned and developed.
- Business development both internally and externally, building a pipeline of referrals and centers of influence.
- Presenting and meeting with PCP/PWA clients on a regular basis.
- Manages client-meeting process including initiating & coordinating agenda and materials in conjunction with the Portfolio Manager and his team.
- Ensure the more complex clients' planning needs are identified and met through a comprehensive approach to their total wealth and overall objectives.
- Design and implement a financial plan; partnering with wealth management colleagues on integrating wealth management, wealth transfer and tax efficiency goals.
- Create and execute business development strategies to attract and retain new generations of trust, asset allocation and financial planning clients.
- Participates in client meetings to help educate and provide status reports.
- Monitor financial plan and portfolios in conjunction with Portfolio Manager.
- Desire to work and excel in a collaborative team-based environment.

Job Requirements

Requirements:

- Bachelor’s degree required, Finance, Economics or Business Majors preferred.
- Professional designation preferred and will be supported if in the process of obtaining.
- Must be a local candidate, someone who understands the Tulsa or Oklahoma City area and is currently living and / or working there.
- Strong investment knowledge and product knowledge of wealth management products and services for high net worth clients.
- Technical and analytical skills in wealth planning, wealth transfer, tax, philanthropy, fiduciary practice, asset location and preservation and related disciplines.
- Experience in corporate retirement planning a plus.
- Comfortable presenting and interacting with sophisticated Clients and business partners.
- Must enjoy business development and relationship building and be looking for an opportunity to continually meet and retain new clients.
- At least 5 years of experience in a financial advisory role preferred.
- Series 7, Series 66 and insurance licensing preferred.