At Alaska Wealth Advisors we are a team of smart, driven and capable professionals who enjoy autonomy and flexibility due to the respect we have for each other. Together we approach our work of defining team goals, and the tasks to achieve them, with energy and passion. Individuals' strengths and interests are fostered through continual professional development and mentoring. We are looking for a dedicated professional who values the trust instilled in us by our clients and thrives in a team environment.

Position: Financial Advisor - Lead

Lead Level	
Client Responsibilities	Client retention and reviewing/presenting financial plan and investment recommendations with moderate supervision
Team Responsibilities	Willing to work in a team environment, be a great teammate and demonstrate leadership skills
Firm Responsibilities	Understand and support the firm's vision, mission, and values Engage in teamwork and teambuilding and integrate into the culture of the firm
Growth Responsibilities	Support Senior Advisors and Directors by leading research and projects for the current management and future growth of the firm
Degrees and Designations	Required Bachelor's degree from an accredited university or college Preferred Certified Financial Planner® Designation and Series 65 License
Experience	At least five years
Skills Required	Manage client projects independently, primarily in the following areas: Financial planning, investments, budgeting, taxes, risk management and estate planning Possess strong writing skills Manage complex workload Participate in client meetings Participate in firm marketing and team sales efforts Mastery of the firm's core systems and technology: Microsoft 365 and Office platform; CRM; planning; operations; and trading
Skills to Develop	Manage and expand Center of Influence (COI) base Generate original leads, possess ability to close sales Possess leadership and management skills for development of upcoming Associate Financial Advisors (AFA)
Performance Measures	Advancement of technical skills Development of soft skills related to client communications and sales Development of leadership and management skills Participation in team dynamics
Compensation	Full-time salaried position with standard benefits package; 401(k) and Cash Balance Pension plans; incentive and discretionary bonus plan

Additional Details on Anticipated Responsibilities and Duties:

- Participate in client meetings: provide original thoughts and strategies, coordinate with other advisor in meeting, be able to independently answer some client questions
- Coordinate with the clients' attorneys and CPAs, if needed to obtain information necessary to develop and complete the financial plan
- Oversee AFA development of financial plans including alternatives and recommendations for Senior Advisor's review and client presentation
- Prepare for client review meetings: financial plan updates, portfolio reviews, client data/information gathering, and implementation of recommendations
- Lead client asset management, including coordination of complete financial planning and wealth management integration (analysis, estate planning, tax strategies for assets under management, and portfolio rebalancing)
- Continue to strengthen client relationships, including ongoing and regular client contact and communications. Interact with clients in person, over the phone, and email
- Lead comprehensive financial planning for clients, including coordination of asset management, estate planning and risk management
- Attend prospective client proposal and close meetings
- Participate in marketing strategies and events, and implement tasks for team sales goals
- Attend team meetings, volunteering for research, new initiatives, and management projects for the internal operation of the team
- Participate in screening and implementing new technology and applications

Career Path:

This position is expected to progress to Senior Financial Advisor through a series of levels. Mentoring will be provided to promote skills for excelling at your position, contributing to the business beyond standard job functions, and promoting your development.

Firm Values:

- **T**each to learn and grow as industry experts
- **E**nsure a successful business for decades to come
- We put the "A" in A-team, an engaged team contributes maximum energy for a great work environment
- **C**lients will always be top priority
- **H**armony with work and live is part of our culture