Jr. Financial Advisor

Job Description

Van Leeuwen & Company is a boutique based client centric financial services organization specializing in financial planning and wealth management serving clients throughout the Northeast, particularly in the Princeton-Mercer County area as well as serving clients across the U.S. Our clients are corporate executives of Fortune 500 companies and their families, individuals dealing with loss, non-profit organizations and people who have made the U.S. their home. We are looking for a highly motivated, individual who possesses an entrepreneurial spirit to join our team of professionals with the desire to serve clients with a "Michelin" star level of service.

We have a long term career opportunity which will expose the right candidate to the independent RIA space with potential opportunities for partnership. If you wish to be a part of this dynamic growing organization, we look forward to hearing from you for positions available in our Princeton NJ office.

Primary Responsibilities

Meet with clients and prospects to develop their financial planning needs and evaluate their risk tolerance through a series of ongoing meetings gathering supporting documentation – state & federal income tax, investments, retirement benefits, estate planning, healthcare directives, insurances. Candidate will work collaboratively establishing strategies in order to meet client's short and long-term goals.

Qualified candidate will work directly to manage a client base of 80-100 relationships, responding to their needs with the utmost urgency. As necessary, candidate will be responsible for uncovering additional opportunities through high touch communication. Regional travel will be required; up to 75%.

Candidate will be required to collect, analyze and communicate complex information to the team based on client meetings. Determines action steps and follow-up procedures for each new or existing client. Expected to work collaboratively with team members as liaison between clients/prospects in order to exceed their expectations.

Must demonstrate highest level of ethics, discretion and confidentiality with respect to all client and firm information and communication.

Participates in various weekly team meetings and follows up on firm generated leads. Will maintain all current licenses and credentials as required as well as staying current with industry changes and financial planning matters.

Job Requirements

- Bachelor's degree (business related discipline strongly preferred)
- FINRA Series 7, 63, 65 registrations required
- Resident State Insurance License preferred

- CFP® or ChFC preferred or working toward

Desired Skills and Experience

- Jr. Advisor with 3+ years of experience in financial services that directly aligns with the specific responsibilities for this position, including existing relationships.
- A demonstrated track record of consistently meeting and/or exceeding performance expectations; exhibits a bias for action and avoids workplace distractions
- Ability to draw upon past/present experiences and acquaintances to develop markets and build upon them to sustain long-term relationships.
- Results-driven, highly motivated, self-starter who possesses integrity, a strong work ethic and the desire to help others plan for and protect their financial futures.
- Team player who possesses excellent interpersonal skills and communication abilities, with a high degree of self-confidence

Compensation

- Commensurate with experience

Benefits

- Comprehensive health, life, dental and eye coverage available.
- Competitive retirement plan package

Qualified candidates may submit a cover letter and resume to info@vanleeuwenco.com.