

Associate Financial Advisor

About the job

Principia Private Wealth at Thurston Springer is seeking an experienced, dedicated financial advisor to join our rapidly growing team. We understand the challenges you encounter in building a successful financial career, and our team offers introductions to established client relationships for you to develop and serve.

As an advisor on the Principia Private Wealth team, you will serve as the primary relationship manager for both clients we assign to you and those you acquire independently. You will be expected to strengthen and expand client relationships, collaborate with our team to address complex financial situations, and execute effective wealth management strategies.

Our team is experiencing significant growth. The advisor who joins Principia Private Wealth will be provided with opportunities to expand their business, deepen their expertise, broaden their experience, and increase their income.

We provide:

- Competitive base salary with unlimited earning potential based on your individual production.
- Access to a strong pipeline of prospects - while we value candidates who have built their own book of business, bringing an existing client base is not required. We provide clients and leads for you to engage with from day one.
- Comprehensive benefits package including a generous PTO policy, health insurance, dental insurance, 401(k) plan, and life insurance.

We expect:

Daily responsibilities and essential duties include the following:

- Collaborate with existing clients to gain a deep understanding of their financial and family circumstances. Build trust and confidence to address financial matters efficiently and effectively.
- Identify and capitalize on new business opportunities uncovered during client interactions.
- Work closely with both internal and external partners to help clients achieve their estate and financial planning objectives.

- Attract and retain high-net-worth clients by leveraging our team's established client base, centers of influence, targeted prospecting, and referrals.
- Deliver exceptional customer service at every stage of the client relationship.
- Commitment: Each new team member is expected to demonstrate dedication to our team's strategies for financial planning and wealth management.

Desired Skills and Experience

We require our candidate to have:

- Five (5) years+ experience in the financial services industry
- State Life and Health Insurance Licenses
- FINRA Series 7 registration
- FINRA Series 65 registration, or equivalent
- Certified Financial Planner (CFP®) certification is desired but not required.
- Excellent written and oral communication skills
- Strong organizational skills with attention to detail
- Team player attitude and mentality
- Proven business development skills
- Highly motivated, self-starter with the ability to multi-task
- Professional appearance and demeanor