

Job Title: Financial Advisor

Description: A Financial Advisor combines personal skills with all the resources of Smith Barney and Citigroup, for the purpose of helping clients realize their financial goals. Financial Advisors are provided extensive training to help them build their own business, which includes attracting and servicing relationships with their clients. Financial Advisors are responsible for assessing a client's circumstances and objectives, and based on those, go on to provide individualized, highly strategic investment consulting. Financial Advisors have access to a full range of wealth building, managing and preserving services throughout the Firm, including mutual funds, stocks, bonds, IRAs, credit & lending, insurance, estate planning and many other services that they will offer to their client base and the investing public.

Responsibilities:

- Develop and cultivate your own client base/Prospect and service clients business.
- Analyze investment opportunities and client needs, and recommend appropriate strategies.
- Build client relationships based upon developing strategies to their financial goals through the use of financial planning and wealth management.
- Market and sell appropriate investment products, financial and wealth management services/products to clients.
- Prepare and deliver presentations/seminars to clients and prospects for business development purposes.
- Attend Financial Advisor meetings and continuing education sessions to stay current about products, services and policies.
- Comply with all industry rules and regulations.
- Ability to create a sales and marketing strategy for new client relationships.

Minimum Qualifications:

- Track record of successful work experience for a period of three to five years.
- Ability to acquire Series 7 and 66 registration, and additional licensing needed to assist in building a career as a Financial Advisor.
- Ability to communicate effectively with co-workers and clients.
- Excellent written and oral communication skills.
- A bachelor's degree is preferred with five years of business experience and proven success in a previous career.

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