Position Description: Financial Advisor

Client: Beacon Financial Planning, Inc

About BFP:

Based in Hyannis, Beacon Financial Planning is a Fee Only, Independent advisory firm. Their clients rely on them to assist with all the moving parts of their financial journey so they can focus on that which is most important to them.

BFP has built their reputation on trust, integrity, and a commitment to providing personal service to every individual with whom they have a relationship. Their primary goal is to help clients maintain or reach financial independence without sacrificing their quality of life.

BFP specializes in comprehensive financial planning and investment solutions. They have learned that the best financial plans stem from a clear understanding of their clients' personal situation and long-term goals.

Company Website: www.bfpcc.com

Seeking a Financial Advisor
BFP seeks a team member who would like to establish a long-lasting relationship and grow with the firm. This opportunity is a good fit if you are: goal oriented, hungry, and looking to thrive in a can-do atmosphere where every member of the team is valued and willing to help one another.

- CFP designation preferred or willingness to obtain will be viewed favorably
- No portable book of business required, however track record of sourcing business externally through COI's, networking and/or community contacts is required

Candidates should have a minimum of 5+ years advisory experience in a client facing role. Candidates must have the confidence and professionalism necessary to work with and communicate effectively with highly educated prospects and clients. Experience in solution based/consultative approach preferred.

Training is an important part of this role. The first few months on the job will be committed to learning and understanding firm policies and procedures. This new team member will be trained on everything from how to leverage the CRM, preparation of portfolio reviews, building and maintaining financial plans, to bigger picture items such as compliance policies and trading procedures.

Upon demonstrating a strong sense of firm policies & procedures, the new team member will then begin to sit in with the principal and other CFPs on client meetings to gain hands-on experience. The long-term hope is for this team member to eventually start servicing some existing firm clients on their own as well as nurture new client relationships.

Seeking someone who is smart, has high empathy, is humble, hungry to learn and grow, and possesses high ethical standards.

Some of the responsibilities will include:

- Financial Planning & Coaching: guide clients through financial planning and make time to understand their goals and develop action items to position them to achieve said goals. Planners work directly with clients in person, virtually, via phone and email to provide custom planning and personalized coaching
- Manage client relationships and support clients: meet with clients every six months and as needed to review their goals, investment portfolio, risk management, cash flow, tax efficiency, estate plan, etc. Nurture relationships and gain a deep understanding of clients' unique needs and aspirations to confidently advise them on their financial goals
- Portfolio management: Financial Advisor responsible for on-going monitoring of clients' investment portfolio and creating and delivering investment recommendations
- Be an active part of a collaborative team and share best practices to proactively identify financial planning solutions for clients
- Prepare and present customized personal financial plans from data gathering phase to client presentation
- Provide assessments of current financial plans and offer strategic considerations
- Serve as a consultative internal resource on such topics as estate planning, taxes, philanthropic strategies, cash flow planning, and insurance
- Interact with clients' professional service providers, including trust & estate attorneys and accountants
- Participate in business development networking & meetings with prospective clients

Skills/Requirements:

- CFP® Designation preferred
- Positive attitude and compassionate team player a must
- Client First Mentality: Approaches every interaction with a client centric attitude and a specific intent to create a confident experience
- Ability to thrive in an agile and fast paced work environment
- Client management excellence: Demonstrated strength in high touch and high-volume relationship management
- Independence: Ability to drive personal productivity and to thrive in your daily responsibilities. Excellence in personal time management and task completion
- Strong networking skills
- Experience with financial planning & portfolio management software (eMoney, Advyzon, Morningstar)
- Interest and history in research of investment options; Investment Committee membership is not required, but is encouraged
- Compliance experience a plus

Compensation & Benefits

- Compensation commensurate with experience
- Hybrid workspace with a mix of in office and remote work. Specifics are dependent upon team and will be discussed
- Competitive benefits package: retirement plan with employer match, insurances, HSA, FSA, PTO, Professional Development Assistance

Ours and your confidentiality are of utmost importance. Please submit your resume and cover letter to Katie@bfpcc.com