



Position Description

Title: **Financial Advisor**
Reports to: Lead Advisor
Benefits: Yes
Status: Non-exempt
Submit resume to Rick Reneker: rrecker@sym.com

The Company

SYM Financial Advisors is a fee-only, employee-owned financial advisory firm which combines investment and wealth building strategies with strong relationships. We are dedicated to a client-centric philosophy of devoting the extra time, resources and energy to uniquely know each client and their goals. We specialize in portfolio management and wealth management for high net worth families, foundations, and not-for-profit organizations, as well as retirement plan management for small to mid-size businesses. Our client service teams include over 60 motivated and experienced professionals in five locations in Indiana and Michigan. We work with over 1,300 clients, overseeing nearly \$3.7 Billion of investable assets. Rooted in traditional values, SYM Financial Advisors serves as a trusted expert to our clients, using our team's deep knowledge and vast experiences to be an advocate for our clients to help them achieve their vision of financial success.

Job Summary

As a Financial Advisor, you will have the opportunity to build strong relationships with clients and assist them with attaining their financial goals. Developing and maintaining financial plans for high-net-worth individuals is both intellectually stimulating and personally rewarding. A successful candidate will formulate, implement and monitor a variety of planning strategies related to cash flow, income tax and estate planning, insurance and risk management, and investment portfolio analysis and oversight. This position is designed to provide a career path leading to the role of Lead Advisor.

Duties and Responsibilities

- Managing client relationships through ongoing client contact and communications to establish and maintain a complete understanding of their financial objectives
- Delivering exceptional client-focused customer service in all aspects of financial plan development, execution and management
- Overseeing and monitoring individual investment portfolios while ensuring alignment with client goals and objectives
- Direct consultation with attorneys, accountants and other advisors on financial, estate and tax planning
- Develop and/or deliver educational presentations to clients and staff

- Develop new client relationships via existing client referrals and local centers of influence

Qualifications

- Bachelor's Degree from an accredited college or university; CFP designation strongly preferred
- Proficiency in Microsoft Word, Excel, PowerPoint, and Outlook, as well as financial planning and account management software
- Financial planning /wealth management / qualified plan acumen, experience required
- Excellent listening, written and verbal communication skills
- Client first attitude
- Ability to manage multiple projects and deadlines with a keen attention to detail
- A team player, with strong coaching and leadership skills
- Desire /ability to work successfully in a small company environment

Salary and Benefits

Pay / benefits are competitive based on industry standards.

- Salary will be based on experience. Performance reviewed 90 days from date of hire. Thereafter, performance is informally reviewed each calendar quarter and formally reviewed at year end.
- Incentive compensation
- Benefits include paid time off, health care, 401(k), life and long term disability insurance
- Partial and/or full financial support for professional accreditation/continuing education requirements and other education/training opportunities

Working Environment

This position requires an average of 45+ hours per week to perform. Consistent attendance is required. Because of frequent contact with clients, appropriate manner, conduct, and grooming needed. The working environment is smoke-free.