Financial Advisor

Diversified, LLC, a leading Financial Planning, Registered Investment Advisor (RIA), Tax and Insurance financial services firm with offices in Wilmington, DE, West Chester, PA, Wayne, PA, Birmingham, AL, Northampton, MA and Cape Cod, MA, seeks a Financial Advisor to work on the team of a Senior Financial Advisor and Partner in the firm. This job will be based out of the Wilmington, DE office.

The candidate must be an accountable, motivated, self-reliant team member who is comfortable working both independently and collaboratively with a team. This person must handle a variety of tasks simultaneously, have first-class communication skills, be highly detail-oriented and have diligent follow-through.

The perfect candidate is interested in a long-term position with upside in a fast-growing, established firm with a family-oriented environment.

Responsibilities include:

- Contacting prospect leads to generate introduction appointments
- Reporting and tracking of lead activity from multiple lead generation sources through an aggregator
- Attending meetings with current clients and taking notes
- Attending and eventually running financial review meetings with clients and at which point responsible for generating referrals from those clients
- Eventually managing relationships with select clients and prospects while growing Assets Under Management
- Assisting with client onboarding experience including data gathering, case design, financial plan presentation, implementation, and follow-up
- Providing a world class client service experience in each client interaction

Position Requirements:

- Bachelor's Degree
- 3+ Years of Financial Services Experience
- CFP Designation (or willing to obtain the CFP designation within 24 months)
- Series 65 (or willing to obtain within 12 months)
- Focus on world-class client experience and communication
- Highly organized
- Highly detail oriented

Preferred Skills & Experience:

- Sales or client service related experience