Jumet FINANCIAL

Let's build your future together!

621 7th Avenue, Beaver Falls, PA 15010
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Junior Financial Advisor – Full Time

Jumet Financial is committed to providing our clients with well-informed, objective advice, and to create a disciplined framework within which financial decisions are made, implemented, and managed from generation to generation. Jumet Financial is seeking a highly efficient and detail-oriented individual with the same strong standards for the role of Junior Financial Advisor with the potential to grow into a Lead or Senior Financial Advisor. The role of the Junior Financial Advisor is to provide technical financial planning and investment management work, usually with other professional planners in the firm and under the supervision and guidance of a Lead Advisor. The objective is to help the Lead or Senior Advisor to increase and improve existing client relationships and to support the development of new client relationships.

Primary Duties and Responsibilities:

- Attend meetings (both client and prospect) with a Lead Advisor and conduct follow-up tasks with Lead Advisor, service groups, and clients, including developing and executing planning details
- Provide advice to clients and make recommendations on client financial plans and investments (with input from Lead Advisor as necessary)
- Create and organize presentations and illustrations (with supervision of Lead advisor) for new client and prospect financial planning, investment, retirement planning, estate planning, and business succession planning opportunities
- Perform annual account reviews for items including financial status, risk tolerance, time horizon, investment objective, asset allocation, investment performance, advisory account fees, investment restrictions (if applicable), and making updates as needed
- Perform ongoing account rebalances as circumstances dictate
- Perform periodic investment reviews of model and security performance for securities being recommended in client accounts for ongoing appropriateness
- Other assigned duties from management
- Assist Individual Advisors

Qualifications:

- Associates or Bachelors degree in progress or in a finance related field and willingness to continue education towards certifications and/or advanced degrees
- Strong passion to work in and succeed in the financial industry
- Willingness to obtain various securities and insurance registrations (upon request)
- Excellent Computer skills (MS Word, Excel, PowerPoint, and Outlook)
- Excellent communication skills (spelling, grammar and proofreading) written skills and verbal skills
- Excellent organizational and time management skills
- Ability to prioritize and multi-task
- Ability to exercise confidentiality and discretion

Eligible candidates will be required to pass a thorough background check.

All qualified candidates should contact Mallory Romano at 814-525-7063 or email resumes to mallory.romano@jumetfinancial.com