



Junior Financial Advisor – Full Time

Jumet Financial is committed to providing our clients with well-informed, personalized 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 research technical financial planning strategies and propose them to the 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 financial plan details
- Sit in meetings with the lead advisor and observe how we advise clients and make recommendations on their 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
- Assist financial advisors with performing 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
- Assist advisors with ongoing account perform ongoing account rebalances as circumstances dictate
- Sit with the Lead advisor to observe how to 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
- All Jumet Financial employees are required to help serve our community through initiatives planned by the Jumet Financial Team

Qualifications:

- Associates or bachelor's 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 email resumes to careers@jumetfinancial.com