

STRATEGIC FINANCIAL SERVICES, INC.

Career Bands - Summary Sheet (By Role)

Select Role (Dropdown)

Associate Advisor

Demonstrated Firm Values	<ul style="list-style-type: none"> - Serve: consistently good - Grow: consistently good - Live: consistently good
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Job Responsibilities & Historical Performance	<ul style="list-style-type: none"> - Client Service: Day-to-day primary/backup contact for clients/prospects and primary back-up to lead and senior advisors. Serve as liason between client service and advisor team / end client. Coordinate key tasks with professional partners outside of Strategic (attorneys, CPAs, insurance providers, etc). No primary relationship management responsibility. - Investment and Financial Plan Execution: Coordinates/Executes/Implements recommendations for client financial plans and investments. - Follow- Up/to- Dos: Timely completion and coordination of action items internally with proper inputs communicated to team members when delegated. - Leadership: Participate in firm groups, initiatives, or interal projects/rocks, as well as in the community.
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Technical Skills	<ul style="list-style-type: none"> - Operational: Working knowledge of the firm's financial planning tech, client facing technology, performance reporting, and crm systems. - Financial Planning: Basic knowledge of key financial planning areas (Risk Management, Tax, Estate, Retirement, Education and Business). - Investments/Market: Basic knowledge of securities markets, global economics, portfolio construction and informed on market conditions and news events, and their implications for investors. - Industry: Basic understanding of key trends in financial planning and legislative changes. - Communication: Good written, verbal and presentation skills. Demonstrated ability to listen, ask good questions, identify opportunities, resolve conflicts, educate and coach clients. - Administrative: Ability to coordinate key tasks with professional partners outside of Strategic (Estate, Tax, Insurance, etc) - Fundamental: solid problem solving, EOS and technology skills
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Strategic Experience	1+ years
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Professional Experience	3+ years
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Professional Credentials/Education	<ul style="list-style-type: none"> - Mandatory Requirement: Desire to enroll in CFP program - Additional Considerations: BA, MBA, Industry Specific or Other Technical Training
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