Description

Pinion Wealth Management (PWM), a regional, independent personal financial planning and wealth management firm, is seeking a Financial Advisor for its Kansas City, KS and Sacramento, CA offices. This individual will work as part of a multi-disciplinary team servicing clients in the region. Pinion Wealth Management is part of Pinion, the nation's leading Food & Ag consulting and accounting firm.

Long-term, significant opportunities for professional advancement and promotions within Pinion Wealth Management exist for talented team members. We offer a competitive salary and benefits packages.

Advisor responsibilities include:

- Developing comprehensive, fee-based personal financial plans for individuals and families.
- Providing various investment advisory services including proposal development, asset allocation modeling, etc.
- Some trading and rebalancing of client portfolios.
- Meeting with clients individually or on a team basis with a PWM partner to review financial and investment plans.
- Responding to various client service requests throughout the year.
- Helping the firm grow through acquisition of new clients and retention of existing clients.

Qualifications:

Ideal candidate will have at least 5 to 10 years of previous experience as a personal financial advisor/planner. The ideal candidate will also possess the Series 7, 63 & 65, or 66 as well as insurance licenses, be highly motivated and have a strong desire to succeed. Excellent organizational, communication, interpersonal and computer skills are required.

Educational requirements:

A bachelor's degree in business or finance and industry-related professional designations such as CFP are preferred.