Job Title: Financial Advisor (Series 65 Licensed)

Position Summary

Boston Wealth Management, LLC (BWM), located in Wayland, MA, is a leading independent Wealth Planning Services Firm founded in 2005. We are seeking a knowledgeable and client-focused Financial Advisor who holds an active Series 65 license. In this role, you will provide investment advisory services, educate clients on financial strategies, and help them pursue long-term financial well-being. The ideal candidate combines strong analytical skills with effective communication skills and a commitment to fiduciary standards.

Key Responsibilities

- **Client Advisory & Planning**
  - Serve as a fiduciary advisor to clients, offering guidance in alignment with the Series 65 regulatory requirements.
  - Conduct comprehensive financial assessments to understand clients' goals, risk tolerance, and time horizons.
  - Develop personalized investment and financial strategies, including retirement planning, asset allocation, and wealth-building approaches.
- **Portfolio & Investment Management**
  - Recommend investment products and portfolio strategies consistent with clients' objectives and compliance guidelines.
  - Monitor client portfolios and financial plans, making adjustments as market conditions or client needs evolve.
  - Stay informed on market trends, economic conditions, and regulatory changes to ensure relevant, accurate guidance.
- **Client Relationship Management**
  - Build strong, long-term relationships by providing exceptional service and proactive communication.
  - Conduct periodic reviews with clients to evaluate progress and refine strategies.
  - Respond to client inquiries promptly and professionally.

Qualifications

- Active Series 65 license (or equivalent Registered Investment Adviser Representative qualification).
- Bachelor's degree, preferably in Finance, Business, Economics, or a related field preferred.
- 2–5 years of experience in financial advisory, wealth management, or related financial services role.
- Solid understanding of investment products, asset allocation, and financial planning principles.
- Proficiency with financial planning tools, CRM software, and Microsoft Office.

Preferred Skills

- CFP®, ChFC®, or other financial planning certifications.
- Experience working under a Registered Investment Adviser (RIA) framework.
- Strong analytical and problem-solving abilities.
- Ability to work independently while contributing to a team environment.

What We Offer

- Competitive compensation structure (salary + potential bonuses).
- Opportunities for career growth within an expanding advisory team.
- A client-centric culture focused on integrity, transparency, and long-term relationship building.
- Medical insurance monthly stipend.
- 401(k) Profit Sharing Plan with company match.

If interested, please contact Christine Theroux, CFP®, CPFA

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