



Description

Established Metrowest Registered Investment Advisory Firm seeks a Financial Advisor

Responsibilities

- Serve as lead advisor to existing clients of the firm whose longtime advisor is retiring, while working within a team atmosphere
- Manage client relationships, providing the highest level of service and support
- Speak with clients over the phone, via email and in person at regular review meetings
- Consult with clients about their allocations and investment strategies as they evolve over time
- Prepare Investment Policy Statements for client portfolios and review investment strategy decisions with the firm's Portfolio Managers
- Prepare financial plans for existing clients using the firm's financial planning software
- Contact clients periodically to determine any changes in their financial status
- Maintain a high level of organization during a busy workday
- Explain to clients the financial advisor's responsibilities and the types of services to be provided
- Follow all compliance procedures as outlined in the Compliance Policy and Procedures Manual
- Respond to the Chief Compliance Officer and other compliance personnel as required/requested for completion of various compliance tasks

Requirements

Skills

- Strong communication and presentation skills
- Ability to work well independently as well as part of a larger team
- Strong time management and organizational skills

Education, Training & Experience

- Certified Financial Planning (CFP®) designation required
- At least five years of relevant industry experience required
- Experience with MoneyGuide Pro, Microsoft Office and Salesforce preferred

Job Type: Full time, WFH flexible

Benefits: 401(k), health insurance, dental insurance, vision insurance, disability insurance, flexible spending account(s), health savings account, life insurance, employee assistance program, paid time off, parental leave, WFH flexible and more.

[Click here to apply for the Financial Advisor position through Grimes & Company's internal website](#)