Not Your Average Job Posting!
Start your new career with us in Westminster, CO!!!

This job posting doesn't need a title because the title doesn't matter, just like your previous work experience doesn't matter. We are looking for the right PERSON, not the right resume. We want someone who is comfortable talking to people, can think on their feet, can relate to people of all ages (especially those in their more senior years), and who has an air of confidence, humor, and authenticity/trustworthiness about them.

While you will have a normal 8am-5pm work schedule, our company is also very socially active with our clients, and you will trade off your normal hours on occasion to participate in activities like golf tournaments, happy hours, camping trips, gun range outings, among many others.

Ok, so on to what you will actually be doing 8am-5pm… The successful candidate will need to combine personal skills, resources and product knowledge for the purpose of helping clients realize their financial goals. They will be responsible for assessing a client's circumstances and objectives, and based on those, provide individualized, highly strategic retirement/investment consulting. They will have access to a full range of wealth building, managing and preserving products - including mutual funds, stocks, bonds, IRAs, insurance, estate planning and many other services to offer to client base and the membership.

But don't let all that financial talk scare you away—we have a comprehensive training program that takes over one year before you're ever expected to perform on your own. You will be matched with a mentor and be taught all the in's and out's of our industry and approach.

Now that you know a little about us and what we're working for, on to the "official" job description we are required to post.

Duties and Responsibilities

- Client Management: Analyze investment opportunities and client needs, and recommend appropriate strategies. Take complex financial information and communicate it to clients in a manner that enables them to make informed decisions. Work closely with client services to have the required paperwork to open accounts. Build client relationships based upon developing strategies to attain their financial goals through the use of financial planning and investment management.
- Client Acquisition: Develop and cultivate your own client base. Work closely with clients and prospects of our company to identify opportunities for referrals.
- Seminars and Webinars: Prepare and deliver presentations/seminars to clients and prospects for business development and educational purposes.
- Teamwork: Must be able to work closely with multiple departments to achieve desired results.

Job Requirements

- Minimum 2 years’ sales experience – proven track record of excellence in sales
- 2+ years in the finance industry a plus
- Series 7 and 63 a big plus
- Bachelor's Degree or equivalent
- Excellent verbal and written communication
- Must have strong relationship building skills
- Must be willing to pursue designations, i.e. CFP, CRPC, and Series 7, 63 and 65, or 66, and life and health insurance, if not already held
- **Must have a clean U-4 and be able to pass a criminal background check and drug screen**

Compensation

- Salary commensurate with experience
- Base pay + Bonus
- Commission begins after 1 full year of training, base pay never goes away
- 100% health coverage for individual

Ensures compliance with all applicable state and federal laws, company procedures and policies. Maintains integrity and ethics in all actions and conversations with clients and prospects. Must comply with all industry rules and regulations.

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

To Apply

Submit your resume here

At **Anew Recruiting** we recognize the unique dynamic in matching a candidate to a company. We devote our time to identifying our client's needs and matching them with our candidate's goals. We know what works: gathering the facts, managing the process and delivering results.