MERITRUST WEALTH MANAGEMENT

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| **Job Title:** | Financial Advisor - Cincinnati |
| **Reports to:** | Managing Member |
| **Level:** | Full-time, Exempt |
| **Last updated:** | September 2021 |

The role of Financial Advisor with Meritrust Wealth Management provides an exciting opportunity for an individual who has great client service and organizational skills, enjoys working in a collaborative office environment and has strong attention to detail and follow-through. This individual will serve and develop his/her client base obtained through referrals and introductions from MCM CPAs & Advisor and his/her own relationships.

**Essential Functions:**

- Serve as advisor on financial service engagements for investment advisor, commission and insurance products and services based on the client's best interest.
- Develop relationships for new clients from new & existing personal and retirement clients and MCM CPAs & Advisors LLP client base.
- Create and maintain comprehensive financial plans that analyze a client's investment allocation, retirement income projections, estate plan, insurance, and cash flow. Utilize knowledge of financial planning concepts to analyze various scenarios for clients to present recommendations.
- Manage investment allocations for clients within the guidelines established by Meritrust.
  - Attend Meritrust internal investment committee meetings
  - Research investment strategies best suited for client.
  - Maintain proper asset allocation per the client's goals.
  - Proactively assess portfolio performance and manager philosophy over time
- Collaborate with MWM Retirement Plan team on any retirement plan opportunities following prescribed methodology and product offering. As needed, conduct or ensure that educational meetings and presentation with retirement plan participants are done on a periodic basis; serve as liaison with third party administrator with qualified plans.
- Delegate to administrative assistant team, ensuring that paperwork is completed and investments are implemented using prescribed RedTail or other system.
- Proactively set and conduct meetings with clients following requirements for documentation and follow-up from meetings including coordinating with administrative assistants on any follow up or new accounts.
- Have continual contact with clients and provide high level of service, promptly responding to requests via email or phone and working to resolve problems when they arise.
- Remain committed to a continuous education on US and global financial markets and economics, new solutions to meet client's financial needs as it relates to investments/estate planning/insurance/retirement income, and new topics in financial planning.

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- Build and cultivate relationship with CPAs; educate them on value-added services to generate client referrals.
- Undertake approved practice development activities to increase contacts with potential clients.
- Turn over all receipts from insurance and investment sales or services to Employer and receive compensation based on agreement.
- Represent Meritrust in a professional manner in the community.

**Education, Experience, and Skills:**

- At least five years of financial services experience with proven track record of client development success and growth of assets under management.
- Series 7 and 66 licensed.
- Life and Health insurance licensed.
- Bachelor's degree required, master's degree preferred.
- CFP or other credentials preferred
- Proficient in technology and in Microsoft Office; ability to quickly learn and adapt to new software.
- Excellent PC skills, including Microsoft Word, Excel, PowerPoint, and Outlook.
- Excellent written and verbal communication skills.
- Organized and detail-oriented.
- Must be comfortable interacting with co-workers, clients, and management.

**Expectations:**

- Respect fellow team members.
- Take ownership of identified processes and responsibilities.
- Keep open communications with advisors and manager.
- Perform work with confidence and pride, follow through to completion.
- Dependable.
- Make informed decisions – discuss with manager when needed.
- Grow and learn from past mistakes.
- Work in a safe, clean, and employee friendly atmosphere.

We are committed to providing equal employment opportunities to all employees and applicants without regard to race, ethnicity, religion, color, sex (including childbirth, breast feeding and related medical conditions), gender, gender identity or expression, sexual orientation, national origin, ancestry, citizenship status, uniform service member and veteran status, marital status, pregnancy, age, protected medical condition, genetic information, disability or any other protected status in accordance with all applicable federal, state and local laws. EOE