monte FINANCIAL GROUP

ASSOCIATE WEALTH ADVISOR

FIRM OVERVIEW

Monte Financial Group, LLC is a fee-only financial planning and investment advisory firm based in Guilford, Connecticut. Our expanding team of eleven operates across two business segments: Wealth Management and Asset Management. We are currently looking for a Associate Wealth Advisor to join our Wealth Management division and contribute to our continued growth and success.

JOB SUMMARY

As an Associate Wealth Advisor, you will be a part of the firm's Wealth Management team. This position is onsite, located at our Guilford, CT office. In this role, you will be expected to manage client relationships through periodic communication, focusing on tracking and advancing clients' financial goals and objectives as defined in our financial planning process.

Additionally, responsibilities will include supporting our internal Wealth Advisors. You will be responsible for developing in-depth investment policy statements and maintaining ongoing communication with the Asset Management team to ensure that clients' investment needs and objectives are met. We seek a dedicated individual committed to building a career as a Wealth Advisor and growing expertise within an RIA firm.

KEY ACCOUNTABILITIES

- Utilize financial planning software to develop comprehensive financial plans for clients.
- Organize and interpret financial information obtained from clients within the financial planning process.
- Develop in-depth investment policy statements and maintain close communication with the Asset Management team.
- Communicate effectively with clients to ensure transparency regarding their financial goals, update them on actively managed accounts, and deliver high-quality advice.
- Retain and strengthen the client base through quality relationship management.
- Expand client base by identifying new opportunities with existing clients, leveraging networking events, and obtaining referrals from centers of influence.
- Monitor industry and regulatory updates, economic trends, financial markets, and cybersecurity threats.

QUALIFICATIONS

- Exhibit emotional intelligence to assist clients in achieving their goals throughout all stages of life.
- Be an active listener and communicator, able to connect easily with others and build trusted, long-lasting relationships.
- Possess advanced analytical skills with a keen attention to detail, accuracy, and deadlines.
- Demonstrate a fiduciary mindset and uphold confidentiality in all matters.
- Exemplify strong organizational skills to manage multiple tasks effectively.
- Dedicated to a career as a Wealth Advisor, with a willingness to pursue the CFP® designation.
- Ability to multi-task and have strong prioritization skills
- Capable of working both independently and as part of a team
- Flexible and adaptable to tight deadlines and evolving client needs

EDUCATION, EXPERIENCE, LICENSES & DESIGNATIONS

- Certified Financial Planner™ (CFP®) or considering the path to be a CFP®
- BA/BS degree
- 3+ years of experience within the financial services industry
- Proficient in Microsoft Office and financial planning software

HOW TO APPLY

For further inquiry, please email **benjamin.monte@montefinancialgroup.com** with an attachment of your resume as a PDF.

For additional company information you may find us on **LinkedIn** or on our **Website**.