

Financial Advisor

A financial services firm in Lisle, IL, is seeking a Financial Advisor to join their growing team. Becoming a Financial Advisor is said to be like going into business for yourself with all the flexibility that implies, but without the capital investment required to start a business and with extensive support from us. The Financial Advisor opportunity gives you the satisfaction of helping others to understand and analyze their financial situation and needs. You'll do this by problem solving, helping clients manage risks and potentially achieve financial security and success. Succeed as a people-person! Every day offers you the opportunity to meet new people, reconnect with your social and professional networks and meet with people who need your help. You will be part of an entrepreneurial system with the freedom to provide solutions for your clients from a broad portfolio of products, access to powerful sales tools, and a large resource network so you can focus on activities that get results.

General Duties

- Develop and maintain long-term relationships with clients
- Provide financial solutions for clients through fact gathering and needs analyses
- Expand personal knowledge and skills through ongoing professional development and joint work with fellow associates
- Maintain continuing finance and sales, licensing and registration requirements
- Work with clients on investment strategies based on their individual financial and investment objectives
- Balance management of referral activities, customer follow-ups and administrative tasks
- Analyze economic trends and apply to analysis of individual client needs
- Comply with all regulatory requirements
- Meet quarterly revenue goals

The duties listed are not set forth for purposes of limiting the assignment of work. They are not to be construed as a complete list of the many duties normally to be performed under a job title or those to be performed temporarily outside an employee's normal line of work.

Minimum Qualifications

- BA, BS, and/or graduate degree or equivalent work experience required
- Strong interpersonal skills and customer service focus
- Market development/networking abilities
- Strong work ethic, self-motivated and goal-oriented
- Excellent communication, presentation, time management and organization skills.
- Strong community presence with an established network of personal and business contacts.
- Ability to listen to client needs and provide financial solutions.

Knowledge, Skills, Abilities, and Other Characteristics

- Problem Solving - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics
- Project Management – Develops & coordinates project plans; Communicates changes and progress; Completes projects on time and budget; Manages project team activities
- Interpersonal Skills - Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things
- Quality Management - Looks for ways to improve and promote quality; Demonstrates accuracy and thoroughness
- Judgment - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions
- Planning/Organizing - Prioritizes and plans work activities; Uses time efficiently; Plans for additional resources; Sets goals and objectives; Develops realistic action plans
- Professionalism - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of their status or position; Accepts responsibility for own actions; Follows through on commitments
- Language Skills: Ability to read, analyze, and interpret common financial reports, and legal documents. Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community. Ability to effectively present information to top management, public groups, and/or boards of directors
- Customer Service – Knowledge of principles and processes for providing customer services. This includes meeting established quality standards.
- Communication – Excellent ability to communicate complex ideas and proposals effectively so others will understand to include preparation of reports, agendas, and policies; Excellent ability to listen and understand information and ideas presented verbally and in writing
- Coordination of Work – Ability to plan and organize daily work routine and establish priorities for the completion of work in accordance with sound time-management methodology
- Computer Skills – Utilizes a personal computer with word processing, spreadsheet and related software with reasonable speed and accuracy; Proficiency in Microsoft Office suite; Working knowledge of Internet research techniques; Solid understanding of marketing principles; Basic understanding of public relations tactics; Must possess excellent leadership skills
- Ability to work cooperatively with administrative, supervisory, technical and professional personnel in the coordination or delivery of services as provided by the agency

The qualifications listed above are intended to represent the minimum skills and experience levels associated with performing the duties and responsibilities contained in this job

description. The qualifications should not be viewed as expressing absolute employment or promotional standards, but as general guidelines that should be considered along with other job-related selection or promotional criteria.

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