ADVISOR SUPPORT SPECIALIST :: Woodbury, Minnesota Office

Are you a recent college grad and have a strong interest in financial planning and wealth management? Or are you someone who has been in the industry for a few years and understands the value of being part of a veteran team who can help mentor and support your professional growth?

Focus Financial is a fee-based independent financial planning and wealth management firm. The Beissler Group, located in **Woodbury, MN,** is offering a truly unique opportunity for just the right candidate. You will begin by learning the systems and processes of this team, and then with a clearly defined road map of progression, you will move toward becoming a financial advisor while continually having the support of a successful and growing team.

Responsibilities:
Initially you will be an integral part of our group by supporting a team of three financial advisors in servicing existing clients as an Advisor Support Specialist. After a proven track record, you will be promoted into an Associate Advisor position. During your time as an Associate Advisor, you will shadow these Advisors and learn all the skills you need to ultimately advance to a full-time Financial Advisor and service clients from their existing book of business.

- Study and achieve a FINRA series 7 and 66 license within two years
- Initially you will learn the fundamentals of financial planning and our practice through execution and client follow-up in the following areas:
  - New client on-boarding
  - Client meeting preparation, paperwork and follow-up
  - Client account service
  - Operation and procedure administration
  - Compliance with industry regulations
  - Project management
- Learn industry software including – Contact Management Software, Financial Planning Software, Trading Platforms, etc.
- Associate Advisor and Financial Advisor roles will have additional growth opportunities and responsibilities.

Preferred Skills & Abilities:
- College Degree.
- Internship in industry or previous experience preferred, but not required.
- Investment experience or interest.
- Must have the following character traits: positive energy, self-starter, loyalty to clients and our firm, be a client advocate, have complete ownership and follow-through of tasks from start to finish.
- Attention to detail at the highest level with the ability to multi-task and flexibility to manage changing priorities.
- Ability to deal with sensitive data and maintain the strictest confidentiality.
- Excellent organizational and communications skills with the highest level of professionalism.
- High proficiency to learn and integrate new technology.

Salary & Benefits:
- Competitive salary based on experience and qualifications and will progress along with title promotions
- 401(k) with company match
- Health insurance options
- Disability insurance
- Generous time off policy
- Continuing professional education opportunities
- Flexibility and room for growth including responsibilities and income potential.

How to Apply
Submit your cover letter and resume to RoseHN@focusfinancial.com.

FOCUS FINANCIAL®
The Beissler Group

www.beisslergroup.com