



Financial Advisor Job Description

Overview

Our Financial Advisors act as advocates for clients with a commitment to continually enhance, enrich, and serve their community. They problem-solve for their clients by researching and proposing educated financial strategies which leads to long-lasting, value-based client relationships. Over time, you will learn to gather, manage and service a book of investment-oriented clients by identifying and acquiring assets and developing additional business through referrals.

Requirements

Our top Financial Advisors share four key personality traits:

- **A Desire to Help Others:** Successful financial advisors want to have a positive impact on others and make a difference in their community every single day.
- **An Entrepreneurial Spirit:** They want to own a business and appreciate the ability to integrate their life and their business, to be present during all the important moments with their families yet dedicate the time and effort to building a business – on their terms.
- **Passion:** They are passionate about the purpose behind their work and the value it brings to their clients and are self-motivated to learn and pursue the best possible scenarios for each individual, family, or business they work with.
- **Desire to Grow Professionally:** They each share a commitment to continued learning. They have the ability to work within their offices and their teams to continually grow their financial knowledge, all with the diligence required for lasting success and the attainment of a level of mastery. In essence, they understand and believe in the mantra of "Learn. Grow. Advance."



Step Forward with Pacific Advisors

At Pacific Advisors, we can help you be a trusted financial advisor for your clients. We take a "you-first" approach, which means providing access to objective, flexible products and solutions. A "you-first" approach gives you and your clients the choices needed to access different investment strategies from a broad universe of investment managers. It also requires us to take a rigorous approach to the products selected and offered by Park Avenue Securities, our primary investment platform. We believe that providing the best for clients requires us to support Financial Advisors with resources, training and an experienced team to collaborate with and assist you.

We want to enable entrepreneurs like you to grow your business your way. This means having the flexibility and choice to achieve your business vision while meeting client needs. It means accessing the right tools and technology to help you build scale and capacity to appropriately gather, manage, and service your clients.

We take an uncommon approach to financial services, focusing on long-term results and leveraging technology, exceptional relationship management and customized strategies to consumers and businesses.

It's time to put yourself and your clients first. We're looking to expand our business with financial advisors who share our passion and values. Our uncommon approach lets you grow your business your way but with the support and backing you need. With Pacific Advisors, you get:

- Simplified technology solutions
- Objective wealth management solutions
- Actionable practice management insights
- Superior service and support

All from a company with strong values and appreciation for your entrepreneurial practice. Learn how you can get the support and culture you're looking for while achieving the vision you have for your business.

Our Mission: Helping People Financially Produce and Support a Good Life for the Rest of Their Lives

Please visit our website to learn more about us: www.pacificadvisors.com/careers .

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