FINANCIAL ADVISOR

MCS Financial Advisors · Milroy, PA

Job highlights

Qualifications

- With a strong focus on sales and customer service, the Financial Professional should be a true "people person' who enjoys developing professional and mutually beneficial relationships with a wide variety of customers
- Candidates should be self-motivated and driven to exceed expectations in all that they do
- FINRA Series 7, 63 (Preferred)
- State Life & Health Insurance License of state where applying
- Strong sales, marketing, and business development skills
- 2 years of experience in finance, insurance and/or banking

Benefits

- Comp: Base + Bonus
- FINRA Series 65, or 66, preferred
- College degree, preferred
- A clear transition plan and timeline so you know what to expect, and when
- Our orientation course to give you an overview of all the tools and services available to you
- In-person, online, and self-guided training on the breadth of our AdviceWorks technology platform
- An introduction to our vast marketing resources, so you can start using them with current and prospective clients
- Our competitive Health program offers a comprehensive benefits package that supports healthy lifestyles, preventative care and helps to protect against hardship. Our retirement plan offers our employees the opportunity to plan ahead for a strong financial future well beyond their working years

Responsibilities

- The Financial Professional position is responsible for meeting with current and potential bank customers to help determine the best way to serve those customers' investment planning goals

- The Financial Professional will proactively develop a client base to which appropriate wealth management products can be sold
- Collecting and analyzing information regarding the customer risk tolerance, long- and short-term goals, income, assets, investments, and debts; determining which products best meet the customer needs and circumstances
- Advising the customer regarding the advantages, risks, and disadvantages of different products
- Developing internal referral resources to identify customers
- Identifying external prospects and expanding new client relationships
- Identifying cross-sell opportunities, including opportunities to refer customers to other lines of bank representatives through proper customer profiling and needs-based selling
- Understanding and complying with all aspects of bank and Cetera policies and practices, including laws and regulations governing the duties and responsibilities of product sales
- Maintaining all necessary licenses and registrations as required
- Successfully completing all mandatory training in a timely manner
- Maintaining superior and courteous service to promote products and expand customer relationships
- Exceeding customer expectations in terms of accuracy, efficiency, courtesy, and professionalism
- Assistance with account transfers and paperwork, and frequent updates on their status
- Help with communications to your current clients about your transition

Job description

Comp: Base + Bonus

Financial Professional

What we need:

Attention finance, insurance, and sales professionals—are you ready to take on a position that challenges your skills and rewards your performance? MCS Financial Advisors is looking for motivated and capable individuals to fill the role of a Financial Professional. For more information, and to apply online, please scroll down.

What you will do:

The Financial Professional position is responsible for meeting with current and potential bank customers to help determine the best way to serve those customers' investment planning goals. Get more out of your career with a company that invests in YOUR success – Welcome to MCS Financial Advisors!

The Financial Professional will proactively develop a client base to which appropriate wealth management products can be sold. Duties will include:

· Collecting and analyzing information regarding the customer risk tolerance, long- and short-term goals, income, assets, investments, and debts; determining which products best meet the customer needs and circumstances

· Advising the customer regarding the advantages, risks, and disadvantages of different products

· Developing internal referral resources to identify customers

· Identifying external prospects and expanding new client relationships

· Identifying cross-sell opportunities, including opportunities to refer customers to other lines of bank representatives through proper customer profiling and needs-based selling

· Understanding and complying with all aspects of bank and Cetera policies and practices, including laws and regulations governing the duties and responsibilities of product sales

· Maintaining all necessary licenses and registrations as required

· Successfully completing all mandatory training in a timely manner

· Maintaining superior and courteous service to promote products and expand customer relationships

· Exceeding customer expectations in terms of accuracy, efficiency, courtesy, and professionalism

What you need to have:

With a strong focus on sales and customer service, the Financial Professional should be a true "people person' who enjoys developing professional and mutually beneficial relationships with a wide variety of customers. Candidates should be self-motivated and driven to exceed expectations in all that they do. Additional requirements of this position include:

· FINRA Series 7, 63 (Required)

· State Life & Health Insurance License of state where applying

· Strong sales, marketing, and business development skills

· 2 years of experience in finance, insurance and/or banking

Really catch our eye with:

· FINRA Series 65, or 66, preferred

· College degree, preferred

What we give you in return:

At MCS Financial Advisors, we're committed to helping you reach your goals – both professionally and personally. With outstanding income potential and scheduling flexibility, the MCS Financial Advisors team continues to build on a reputation for success that is more than 9 years in the making. As a member of our organization, you'll have access to:

· A clear transition plan and timeline so you know what to expect, and when

· Our orientation course to give you an overview of all the tools and services available to you

· Assistance with account transfers and paperwork, and frequent updates on their status

· Help with communications to your current clients about your transition

· In-person, online, and self-guided training on the breadth of our AdviceWorks technology platform

· New business cards, stationery, and email address

· An introduction to our vast marketing resources, so you can start using them with current and prospective clients

MCS Financial Advisors is a fast growing company that is in the midst of tremendous change. Our jean friendly culture is one that expects all the highest quality customer service that will turn our clients into raving fans.

Our competitive Health program offers a comprehensive benefits package that supports healthy lifestyles, preventative care and helps to protect against hardship. Our retirement plan offers our employees the opportunity to plan ahead for a strong financial future well beyond their working years.

About the Company:

MCS Financial Advisors is a marketing name for Cetera Investment Services. Securities and insurance products are offered through Cetera Investment Services LLC (doing insurance business in CA as CFG STC Insurance Agency LLC), member FINRA/SIPC. Advisory services are offered through Cetera Investment Advisers LLC. Neither firm is affiliated with the financial institution where investment services are offered. Individuals affiliated with this broker/dealer firm are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

MCS Financial Advisors is committed to providing an equal employment opportunity for all applicants and employees. For us, this is the only acceptable way to do business. Accordingly, all employment decisions at the MCS Financial Advisors, including those relating to hiring, promotion, transfers, benefits, compensation, and placement, will be made without regard to race, color, ancestry, national origin, citizenship, age, physical and/or mental disability, medical condition, pregnancy, genetic characteristics, religion, religious dress and/or grooming, gender, gender identity, gender expression, sexual orientation, marital status, U.S. military status, political affiliation, or any other class protected by state and/or federal law.