MARQUIS
Wealth Management Group
Personalized Financial Services

Associate Financial Advisor Job Description

Overview

Marquis Wealth Management Group seeks a motivated individual to expand its financial planning team. The ideal candidate will have up to 5 years' work experience in the personal finance industry. This individual will work with the firm's advisors in all aspects of the personal financial planning and investment process for the firm's clients. The ideal candidate will be a collaborative and team-oriented individual with a high ethical character, as well as a self-starter with a strong work ethic who enjoys the entrepreneurial culture of a small firm. This position has opportunities for further advancement based upon the growth and performance of the firm and the individual, and job responsibilities will be tailored based upon the candidate and their prior work experience.

Responsibilities

- Preparation of periodic investment performance reports to clients in support of the advisor.
- Data input and preparation of draft financial plans for clients, including an executive summary cover letter.
- Preparation of periodic Morningstar analyses of existing and prospective client portfolios, including executive summary cover letter.
- Preparation for and participation in client meetings, with responsibility for inputting meeting notes to the firm's CRM software.
- Maintain the firm's list of recommended investments (funds and individual securities), under direction of the Partner in charge of research. This includes listening to and keeping notes of stock and fund conference calls.
- Participate in and keep minutes of periodic meetings of the firm's Investment Committee.
- Prepare annual reviews of the firm's company retirement plan clients.
- Collaborate with the firm's other Advisors to deliver all aspects of the personal financial planning process to the firm's clients, including: investment management, insurance review, estate planning, tax planning, retirement planning, and education planning.

Requirements

- Minimum Bachelor's Degree and up to 5 years of investment management or financial planning experience, with a strong preference for concentrations in finance or financial planning.
- Well-organized and detail-oriented personality, with ability to effectively prioritize, manage, and complete projects from multiple sources.
- Strong interpersonal, written, and verbal communication skills.
- Strong analytical skills.

- Expertise in Microsoft Office Suite. Experience with Morningstar Advisor Workstation, Portfolio Center, Moneytree Silver Financial Planner, or Junxure CRM is a plus.
- Series 65 and State Life Insurance licensing will be required within 6 months of hire.
- Completion or partial completion of the CFP® education requirement is a plus.
- Intellectual curiosity about personal finance, economics, and investments.
- Willingness to learn.

What We Offer

- Competitive salary commensurate with experience and the area
- Discretionary bonus
- Group Medical and Life insurance
- 401(k) plan with discretionary profit sharing
- Holiday and Personal Time Off
- Continuing Education Reimbursement

About the Firm

Marquis Wealth Management Group is a growing, privately held, fee-based, independent Registered Investment Adviser (RIA) founded in 1999 and located in Fort Myers, FL. The firm currently manages over $295 million in client assets and provides comprehensive wealth management and financial planning services to high net worth individuals, specializing in sudden wealth events. Additional information can be found at www.marquiswealthgroup.com.

To apply, please send resume and cover letter to:

Marquis Wealth Management Group
Attn: Trevor Whitley
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Fort Myers, FL 33919

By email: trevorw@marquiswealthgroup.com