CORNERSTONE
FINANCIAL
GROUP

Burlington, MA

Please send resume to:
mross@htk.com
www.mikerosscornerstone.com

The Opportunity

Our Independent Financial Advisory firm is looking for an Associate Financial Advisor to support one of our principal advisors. We are looking for someone who wants to be involved with all aspects of the business, has a service mindset, and wants to plan for and make a difference in the lives of some of our wonderful clients. In addition to developing your skills, you will be mentored by a successful advisor who has been in the business for over 25 years.

The Right Candidate Will:

- Attend and contribute to client meetings
- Coordinate meeting preparation and follow-up
- Assist senior advisor in relationship management
- Lead new client relationships from incoming referrals and assigned clients
- Prepare and update financial plans using our technology tools such as: eMoney, SmartOffice, Wealthview, Morningstar, Envestnet, Pershing NetX
- Implement recommendations and research financial planning opportunities for clients

With the opportunity to advance to:

- Assisting with trading and rebalancing client investment accounts
- Delivering multidisciplinary financial planning advice independently
- Developing and managing ongoing client relationships independently
- Participating in strategic plan and direction of firm.

Ideal Candidates Have:

- Bachelor’s degree
- Life & Health Licenses, Series 7 & 66 (preferred)
- CFP® designation or 2+ years of experience in financial services industry
- Working knowledge of investment management
- Strong written, verbal and technical skills
- Positive attitude and are self-motivated, intellectually curious, ethical, professional, and detail oriented

What We Offer:

- Salary and bonus
- Group Life, Short and Long Term Disability Insurance
- Contribution towards health insurance
- Simplified Employee Pension contributions

Cornerstone Financial Group is:

A well-established independent firm that works with several generations of clients to help them with their investment, insurance and financial planning needs. We deliver comprehensive financial plans and wealth management to successful families and small businesses. We are comprised of the independent practices of three industry veterans and their staff who all share ideas and have varied levels of expertise.

Creating customized financial plans, one client at a time.