Balance Investments LLC is a full-service investment management and financial planning firm providing investment advice, investment management and life insurance protection to individuals, families and businesses. Our clients are everyday people, with specific financial goals and the desire to provide for themselves and their loved ones. Established in 2014, our firm is dedicated to working for our clients to help them successfully achieve their financial goals.

The Investment Advisor Role

The primary role of the Investment Advisor is to generate business by establishing new clients and utilizing The Balanced Approach to deliver personalized investment and financial advice to both new and existing clients. The Investment Advisor will have the ability to work independently to grow business and serve clients while demonstrating a strong desire for performance driven compensation and growing their earnings. If you enjoy helping people achieve their financial and investment goals, protect their families and loved ones and seek to earn a great income with an opportunity to grow with a growing firm, we urge you to apply for a job with our company as an Investment Advisor. We're looking nationwide for bright, talented, entrepreneurial-minded professionals with a passion for the financial service industry that wish to work for an energetic and expanding company. We're a unique firm with a unique client approach and a growing roster of customers. Join us.

Investment Advisor Responsibilities

- Develop and manage positive, long term relationships with current clients and prospective clients
- Ability to generate new individual, business segment and high net worth clients
- Schedule and conduct portfolio reviews, recommend, monitor and manage investment portfolios and insurance solutions
- Proactive engagement and interaction with clients after initial meetings and conversations and throughout the calendar year and conduct at-minimum annual portfolio reviews with clients
- Respond to prospective client inquiries about financial planning services
- Develop, deliver and provide continuous financial planning support to clients
- Maintain awareness of latest legislative changes that may affect financial planning and investments
- Effectively generate referrals from clients and prospective clients
- Respond appropriately and effectively to address client questions and concerns
- Participate in investment, insurance and sales Continuing Ed programs and maintain good standing

Investment Advisor Qualifications and Skills

- Excellent computer, organizational, written and verbal communication skills
- Strong desire to succeed and help clients
- Must be ethical, self-motivated, hard-working and professional
- Possess strong knowledge of the investment business and strong understanding of financial planning concepts
- Ability to explain complex financial issues and concepts in plain spoken language to clients
- Series 65 and Life Insurance license required or be willing to obtain
- Clean background required

Compensation

- Investment Advisor (Full Time): $90,000+ (first year)

For more information, visit our website at www.balance-investments.com or call (980) 949-1949.