



# GREENSPRING ADVISORS

Corporate Retirement | Wealth Management

## Position Description: Senior Financial Advisor

Location	Lancaster, Pennsylvania – ON-SITE, Not Remote
Purpose	<p>At Greenspring, our Core Purpose is to “help every person live their ideal life” and we are looking for talented people who share this passion. Working at Greenspring gives you the ability to:</p> <ul style="list-style-type: none"><li>• Own your future with defined career paths and tools, coaching, and support to help you create the future you want</li><li>• Thrive in a great culture where you’ll be a part of a team of people who are committed to each other’s success</li><li>• Make a lasting impact on the lives of our clients through the camaraderie of working for a common goal with your peers</li></ul> <p>The Financial Advisor will work in conjunction with their team to determine the financial needs of clients and provide advice and guidance to them, making recommendations on services and investments that best fit their needs. They will rely on extensive experience and judgment to help clients solve complicated financial and investment management issues.</p> <p>The individual will spend approximately 80% of their time with existing on-going client relationships, while the remaining 20% will be focused on developing new client relationships.</p> <p>This role is critical to setting and maintaining high service standards for the firm, creating positive client experiences, and for fostering a culture of teamwork and collaboration.</p>
Responsibilities	<ul style="list-style-type: none"><li>• Conduct all on-going client meetings, including periodic and initial planning meetings with prospective clients</li><li>• Work directly with the financial planning team to determine the best investment strategy for clients based on risk tolerance and goals</li><li>• Attend and close initial prospective client meetings and onboard new clients into the firm</li><li>• Solve complicated financial planning, estate, tax and retirement issues</li><li>• Coordinate with Marketing and Compliance to generate content for prospecting, marketing and education purposes</li></ul>

Specific Measures of Success	<ul style="list-style-type: none"> <li>• Responsive to requests and resolves open tasks and inquiries</li> <li>• Proactively eliminates obstacles before they become issues</li> <li>• Demonstrates efficiency by leveraging firm resources and tools</li> <li>• High degree of pride in the accuracy and quality of your work product</li> <li>• Builds new relationships with prospects and centers of influence</li> </ul>
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## Job Requirements

Industry/Business Experience	Minimum 3-5 years in financial services and/or financial planning. Existing client base that will transfer is preferred, but not necessary.
Education	<ul style="list-style-type: none"> <li>• College degree or comparable experience.</li> <li>• CERTIFIED FINANCIAL PLANNER™ certification</li> <li>• If not currently a CERTIFIED FINANCIAL PLANNER™, the Candidate should have their Series 65 license.</li> </ul>
Skills and Knowledge	<ul style="list-style-type: none"> <li>• Familiar and fluent in understanding a variety of the financial planning concepts, practices, and procedures</li> <li>• Highly relational with clients, teammates and centers of influence</li> <li>• Focused on client needs and customer service at all times</li> <li>• Trusts the evidence through data and analysis</li> <li>• A self-starter who is entrepreneurial, assertive, proactive, and independent</li> <li>• A team player with good interpersonal skills and the ability to work collaboratively across departments</li> <li>• Excellent oral and written communication skills</li> <li>• Demonstrated problem-solving abilities</li> <li>• Ability to excel in a fast-paced, changing environment</li> <li>• Expert in most Microsoft Office applications. Comfortable learning and navigating new technology and software applications. Experience with Salesforce, Tamarac, MoneyGuidePro, and Morningstar a major plus.</li> </ul>
Requirements/Additional Information	<ul style="list-style-type: none"> <li>• The first 90 days of employment will include an extensive onboarding/training program</li> <li>• After the first 90 days and with manager's approval, the Candidate may be eligible to work from home for a specified number of days per month</li> <li>• Some periodic travel to company HQ and client meetings should be expected</li> </ul>
How to apply	Send your resume to <a href="mailto:careers@greenspringadvisors.com">careers@greenspringadvisors.com</a>

## Firm Profile

Greenspring is consistently ranked as one of the country's leading independent advisory firms. We look to hire talented individuals with leadership potential, integrity, a sharp analytical mind, creativity, and the ability to work interdependently with others. We offer a competitive compensation package including:

- Health, Dental, and Vision Insurance Offered
- Health Savings Accounts
- 401(k) Plan with employer match and discretionary profit-sharing contributions
- Paid Leave & Vacation Allowance
- Paid Short-Term and Long-Term Disability Insurance
- Paid Group Life Insurance
- Free financial planning and investment management services
- Eligibility for GREEN Units (equity compensation) after 2 years with the firm
- Annual professional development stipend for continuing education, courses, conference attendance, etc.
- Cellphone Usage Reimbursement
- Matching Gifts Program
- Stand-up desks, dual computer monitors, monthly social events, and volunteer hours

Greenspring is an Equal Opportunity Employer. It is the policy of the Company to provide equal opportunity for all employees and applicants for employment without regard to race, color, creed, religion, gender, sexual orientation, national origin, age, marital status, mental or physical disability, pregnancy, military or veteran status, or any other basis prohibited by state or federal law. This policy also prohibits employees from harassing any other employees for any reason including, but not limited to, race, religion, sex, national origin, age, or disabled status.