GREENSPRING ADVISORS

Corporate Retirement | Wealth Management

Position Description: Financial Advisor

Location	Lancaster, Pennsylvania – ON-SITE

Purpose	At Greenspring, our Core Purpose is to "improve lives by helping people make better decisions for themselves and those who depend on them" and we are looking for talented people who share this passion. Working at Greenspring gives you the ability to: • Own Your Future with defined career paths and tools, coaching and support to help you create the future you want • Be Part of a Great Culture where you'll be a part of a team of people who are committed to each other's success • Make a Lasting Impact on the lives of our clients and through the camaraderie of working for a common goal with your peers The Financial Advisor is an entry-level position that will work within our Private Client Group, supporting their assigned Advisor Team. The individual will spend most of their time attending and observing meetings and completed and/or delegating workload to client service and financial planning specialists, while learning how to communicate financial planning principals to new and existing clients and building relationships. 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.
Responsibilities	• Attend initial prospective client meetings and help with onboarding new clients into the firm • Assist in the execution of client-service and operational tasks • Work directly with the Financial Planning team to determine the best investment strategy for clients based on risk tolerance and goals • Under the guidance of the Lead Advisors, learn how to assess clients' assets, liabilities, cash flow, insurance coverage, tax status, and financial objectives to establish investment strategies • Prepare, present, and advise in client meetings (once licensed), then delegating follow up tasks to the appropriate department
Specific Measures of Success	• Responsive to requests and resolves open tasks and inquiries • Proactively eliminates obstacles before they become issues

	• Demonstrates efficiency by leveraging firm resources and tools • High degree of pride in the accuracy and quality of your work product • Builds new relationships with prospects and centers of influence

Job Requirements

Industry/Business Experience	1-2 years of business experience is preferred.
Education	Bachelor's degree required. Degree in Financial Planning, Finance, Economics, Accounting, or related field preferred.
Skills and Knowledge	• Base level of understanding a variety of the financial planning concepts, practices, and procedures • Highly relational with clients and teammates • Focused on client needs and customer service at all times • A self-starter who is entrepreneurial, assertive, proactive, and independent • A team player with good interpersonal skills and the ability to work collaboratively across departments • Excellent oral and written communication skills • Demonstrated problem-solving abilities • Ability to excel in a fast-paced, changing environment • 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.
Requirements/Additional Information	• Start base salary range: $60,000-$70,000, with opportunity to earn a discretionary annual bonus up to 10% of earnings • The Financial Associate will be expected to obtain their Series 65 license within the first 6 months on the job. Within 2 years in the role, they should work towards obtaining their CERTIFIED FINANCIAL PLANNER™ designation. • The first 90 days of employment will include an onboarding/training program • 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 • Some periodic travel to company HQ and client meetings should be expected
How to apply	Send your resume to careers@greenspringadvisors.com

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
- GREEN Units (equity ownership in the firm after two years)
- Paid Time Off + Volunteer PTO
- Paid Short-Term and Long-Term Disability Insurance
- Paid Group Life Insurance
- Free financial planning and investment advice
- Annual professional development stipend for continuing education, courses, conference attendance, etc.
- Cellphone reimbursements
- 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.