Associate Financial Advisor – Norfolk, VA/Syracuse, NY

Stratos Wealth Partners, an independent, hybrid RIA and wealth management firm has developed a partnership with a growing organization with locations in Norfolk, VA and Syracuse, NY.

The firm is seeking qualified, experienced Financial Advisors (2-5 years in the business) to join their organization and partner on opportunities for growth in providing comprehensive wealth management solutions to clients. This is a fantastic opportunity to continue to build your practice within a structured program with access to outstanding market and growth opportunities.

In addition to a strong financial model (salary plus incentives), the firm will provide you with coaching and mentorship to help you define a path to success and work with clients to help them achieve their financial goals.

Primary Duties and Responsibilities

- Maintain own book of business while adding capacity and leveraging potential opportunities
- Provide fee based *Financial Planning Solutions* based on the identified risk tolerance, cash flow strategies and appropriate risk and retirement management needs
- Provide fee based consultation solutions pursuant to client personal and/or business financial objectives.
- Develop a thorough understanding of each client's financial situation in order to create and deliver suitable investment strategies
- Provide both verbal and written plans to communicate the recommended solutions following firm guidelines
- Promote professional development by maintaining an in-depth understanding of financial planning, capital markets and the financial services industry
- Stay abreast of significant changes or developments (e.g. taxation, regulatory, legal, competitive, and technical) within the fields of investments and financial services
- Maintain all required licenses and designations
- Maintain an in-depth understanding of compliance, regulatory and departmental policies and procedures

Qualifications

- Minimum of two to five years related financial planning and client relationship management experience
- 4-year related degree
- FINRA Series 7, 66, or 65 and 63 licenses
- Exceptional client relationship management skills - both internal and external client facing.
- Positive attitude with the ability to effectively manage change and adapt in a continual and rapidly changing environment.

Financial Planning Firm Partner – Norfolk, VA/Syracuse, NY

Stratos Wealth Partners, an independent, hybrid RIA and wealth management firm has developed a partnership with a growing organization with locations in Washington DC Metro Area, Greater Atlanta Metro Area, Richmond VA, Charlotte NC, Chicagoland Area, Norfolk, VA and Syracuse, NY.

The firm is seeking qualified, experienced Financial Advisors (5+ years in the business) to partner with their organization on opportunities for growth in their existing business, development of a succession plan, all while providing comprehensive wealth management solutions to clients. This is a fantastic opportunity to continue to build your practice within a structured program with access to outstanding market and growth opportunities while adding stability and continuity to the overall business operations.

In addition to a strong financial model, the firm will provide you with coaching and mentorship to help you improve your path to success and work with other advisors to help them growth and develop their individual practices.

Primary Duties and Responsibilities

- Maintain own book of business while adding capacity and leveraging potential opportunities
- Provide fee based *Financial Planning Solutions* based on the identified risk tolerance, cash flow strategies and appropriate risk and retirement management needs
- Provide fee based *consultation solutions* pursuant to client personal and/or business financial objectives.
- Provide Leadership and Development for Financial Advisor's
- Develop a thorough understanding of each client's financial situation in order to create and deliver suitable investment strategies
- Provide both verbal and written plans to communicate the recommended solutions following firm guidelines
- Promote professional development by maintaining an in-depth understanding of financial planning, capital markets and the financial services industry
- Stay abreast of significant changes or developments (e.g. taxation, regulatory, legal, competitive, and technical) within the fields of investments and financial services
- Maintain all required licenses and designations
- Maintain an in-depth understanding of compliance, regulatory and departmental policies and procedures

Qualifications

- Minimum of five years related financial planning and client relationship management experience and/or annual revenues of $150k and $10 million of AUM
- 4-year related degree
- FINRA Series 7, 66, or 65 and 63 licenses
- Exceptional client relationship management skills - both internal and external client facing
- Consummate Team Player
- Positive attitude with the ability to effectively manage change and adapt in a continual and rapidly changing environment.