Financial Advisor

We are seeking experienced, driven, and focused Financial Advisors to join our firm. Candidates must be self-starters dedicated to growing a practice while providing a very high level of coordinated advice and service to our clients.

Financial Advisors at CPS are responsible for providing businesses and individuals with sound advice regarding their financial planning, investments, and retirement plans. Their duties include meeting with business leaders and individual clients to establish their needs and develop financial plans to maximize profitability or reduce debts and researching investment opportunities for clients.

Duties & Responsibilities

- Meeting individually with clients to determine their financial objectives, risk tolerance, income, expenses and assets
- Educating clients on strategies to help them best utilize their available funds and achieve important monetary goals
- Offering strategic advice on products and services, such as investments, insurance coverage and debt management tools
- Performing market research to stay current with financial trends
- Preparing financial documents, such as income projections and investment reports
- Maintaining compliance with all rules and regulations in the financial industry
- Identifying and pursuing potential clients to maintain a strong client base

Skill Requirements

- In-depth understanding of employer, industry and federal regulations
- Knowledge of financial options, including investments, loans, savings accounts and stock options
- Expertise in estate, tax, retirement, insurance, investment, and cash flow/capital needs planning analysis and strategies
- Familiarity with the securities, mutual fund and insurance industries
- Advanced ability to analyze and explain market data
- Proficiency with word processing, spreadsheet, database and financial planning software
- Analytical thinking skills and the ability to assess clients' needs
- Excellent communication abilities, including writing, speaking and active listening
- Effective presentation and customer service skills
- Commitment to integrity in personal and professional activities
- Highly motivated with ability to function well in a fast-paced environment
- Excellent organizational and leadership skills

Education & Experience Requirements

- Candidates must have a four-year degree. Series 65 license, preferred.
- Experience preferred in financial and/or estate planning work at a professional financial services or wealth management firm.

What's next?

Send your resume to Susan Starr at Susan@cpsinvest.com and take our 7-minute survey below.
https://surveys.cultureindex.com/s/Oq2VWnBAgv/87164

Salary & Benefits

- Competitive salary commensurate with experience.
- Benefit highlights include health, dental, vision, and long-term disability insurance, escalating paid vacation, paid sick time, paid holidays, employer-paid life insurance, 50% 401K match, employer-paid CPE, and team goal bonus.

About Us

CPS Investment Advisors has a long history of building lasting relationships with clients. We work hard to earn their trust and confidence and consider many of them to be good friends and part of our "family". Many of our client relationships have lasted more than thirty years, and we have often worked with multiple generations of family members and organizational leaders. CPS Investment Advisors has been consistently awarded the "Best Places to Work."