



JOB ACCOUNTABILITIES OVERVIEW

**Advisor
November 2013**

About JNBA

Bloomington-based JNBA is a 35-year-old, independent, fee-only wealth management firm specializing in goal-directed asset management and financial planning. Our advisory teams champion a collaborative approach, customizing investment strategies to meet clients' goals and reviewing client portfolios every 10 business days.

Duties

An Advisor role has responsibility for managing existing client relationships by working with a more experienced adviser. The position may be responsible for formulating and implementing advice but may also rely on technical specialists to develop recommendations within an individual specialist's area of expertise. A Certified Financial Planner™ accreditation is desirable. As an active client meeting participant, the Advisor works closely with the Senior Advisors taking direction on client matters as well as overseeing execution with Client Account Specialist team members as appropriate. An important member of the advisory team, the Advisor has frequent direct communication with clients.

Required Skills and Experience

Our ideal candidate has:

- 5-7 years of experience working in the financial services industry with high net worth clients
- Candidate may currently be in Associate or Junior Advisor role and ready for growth opportunity
- Bachelor's Degree
- CFP designation desirable
- A strong desire to learn JNBA's tools and processes
- Outstanding communication skills, both verbal and written
- The position will have access to confidential information and will work in an industry requiring strict performance guidelines to ensure compliance in all activities
- Highly proficient with Microsoft Office (Excel, Word, Outlook) and other software applications
- Demonstrated professional track record of operating in alignment with our organizational values of:
 - o *Integrity*
 - o *Honesty and Transparency*
 - o *Independence*
 - o *Professional Excellence*
 - o *True Service to Others*
 - o *Fulfilling our Fiduciary Duty by Acting in our Clients' Best Interests at all Times*

Salary & Benefits

JNBA offers competitive salary and benefits based on experience and qualifications.

Contact

To learn more about JNBA, please visit our website at www.jnba.com. Interested applicants should send their resume and salary requirements to careers@jnba.com.