

**Tired of pushing the commission boulder up the hill every month?
Wish you could make a difference in financial lives without the sales pitch?**

If so, we want to talk with you!

Francis Investment Counsel is seeking an experienced financial advisor residing in the Minneapolis area to serve as a financial coach, helping workers become better family financial managers without the sales pitch.

Francis Investment Counsel, with its brand MoneyAdvice@Work®, provides financial wellness programs and personal money advice within the workplace, delivering services onsite, on the go, and on demand. You see, we think the traditional wealth management business has it all wrong: they wish to work with the wealthy all the while earning commissions and management fees for their work. Francis Investment Counsel was created different...in a good way. We deliver the money advice workers desperately need through an employer-sponsored financial wellness benefit. And best of all, we sell no retail investment products.

Our ideal candidate has a unique talent for teaching, is understanding and empathic, willing to work hard, and derives deep satisfaction for helping others improve their financial lives.

Here's what you'll do:

1. Develop creative and practical adult financial wellness curriculum
2. Provide on-site and web-based financial education for U.S. workers
3. Advise workers on all money matters including investment advice
4. Ensure that our customers love us
5. Create regular reports which document education and advice activities
6. Stay in the know with financial and retirement planning matters

Your qualifications should include a bachelor's degree, preferably in a business or education field. A Series 65, Certified Financial Planner (CFP) or other similar industry designation with experience in the financial planning industry, adult education, and/or human resources field is preferred. The gift of teaching and a passion for helping others are required. You are super qualified if you are bilingual in Spanish.

When people hear and watch you present, they should say, "that person is good". Plus, you'll need great attention to detail and strong writing skills to handle the back-office planning duties.

Plan on spending about one-third of your time in the office working with individuals and planning onsite programs. Two-thirds of your time will be spent at client locations. Yes, there is some after-hours travel requirements including overnight stays.

This is a unique opportunity to join the Francis team as a full-time salaried coworker enjoying a generous benefit package and collaborative work environment.

Who We Are

Francis Investment Counsel LLC is a nationally recognized and award-winning institutional investment consulting organization with offices in Brookfield, WI, and Minneapolis, MN. We provide investment consulting and participant education and advisory services to qualified retirement plan sponsors and their participants. As an independent Registered Investment Advisor with no broker/dealer affiliations, Francis Investment Counsel does not sell investment products nor receive compensation from the organizations or investment product recommended. Francis Investment Counsel currently consults to over \$8 billion of assets.

Application

Send resume to Susan Salmon, Director of Operations at susan.salmon@francisinvco.com.

The above statement reflects the general details necessary to perform the principle functions of the position described and shall not be construed as a detailed description of all the work requirements that may be inherent during your employment.

Job Description for Advisor – Participant Services

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