



Job description

The **Butson Financial Advisors, LLC (BFA)** of **Stratos Wealth Partners (SWP)** is looking for a talented **Associate Financial Advisor** with 2-5 years experience in the wealth management business or appropriate educational degree to join our organization, and work within our team to provide comprehensive wealth management solutions and financial planning to clients. This is a fantastic opportunity to continue to gain experience by servicing an existing book of business and grow your career within a supported environment. In addition to a strong financial model (salary plus bonus incentives), the firm will provide you with coaching and mentorship to help you define a path to success and work directly with clients to help them achieve their financial goals. We seek to provide an Advisor ample opportunity to grow.

Qualifications & Key Competencies

- Bachelors Degree in Finance or related field
- 2-5 years experience in a client facing role
- CFP Designated or desire to complete
- Knowledge of all financial instruments (investments, annuities, insurance, and financial planning)
- FINRA Series 7 (required).
- FINRA Series 66, or in lieu of 66, the 63 and 65 preferred or desired to attain, (Life and Health not required but a plus)
- Exceptional client relationship management skills – both internal and external
- Excellent communication skills (written, verbal)
- Entrepreneurial and resilient
- Strong work ethic, time management, and the ability to self-manage when necessary
- eMoney Advisor Planning Software (helpful but not required)

Who We Are

The mission at BFA is to deliver financial and lifestyle success to our clientele by implementing experts in every field of wealth management, removing our clients from the day to day details of managing their wealth and staying ahead of any industry curve.

We believe culture plays a crucial role in the success of our company. All members possess the following characteristics: being a team player, being open and comfortable giving and receiving feedback, and are constantly looking to grow and educate themselves personally and professionally (knowing a few good movie quotes doesn't hurt either).

BFA is an equal opportunity employer and considers applicants for all open positions without regard to race, color, religion or belief, sex, age, citizenship status, national origin, marital status, military/veteran status, sexual orientation, genetic information, gender identity, and

physical or mental disability. At BFA, we believe in creating a dynamic work environment that puts value in diversity and inclusion. We strive to recruit a diverse group of candidates to help us achieve that goal.

Job requirements

- Maintain a book of business while adding capacity and leveraging potential opportunities.
- Teach you our Financial Planning process, a cornerstone of client success:
- Hold discovery meetings and present solutions to clients as their needs change.
- Work with our planning team to prepare financial plans and deliver them to clients
- Be able to discuss a client's investment portfolio and help clients adjust their risk levels
- Excellent interpersonal skills, face-to-face relationship building abilities
- Be willing to travel and/or work evenings when necessary
- Excellent organizational skills and experience leveraging technology to improve efficiencies and effectiveness in role
- Ability to identify with our culture, believe in its mission and help achieve firm goals
- Grow and develop professionally by cultivating 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

Job Benefits

- 401k matching
- Annual Bonus
- Dental and Vision insurance (optional, through SWP)
- Health insurance, as a reimbursement (not enrollment in a BFA-sponsored plan)
- Life insurance, optional (not provided by BFA or Stratos)
- Paid time off