



JOB DESCRIPTION ADVISOR SUPPORT SPECIALIST

Interested in joining a team of like-minded professionals that share a passion for reaching goals and delivering high quality results? **ONE DEGREE ADVISORS** is a faith-based, independent financial advisory firm committed to delivering holistic advice with comprehensive financial plans and investment solutions that support the life goals of our clients.

SUMMARY

Full-time Advisor Support Specialist. Though not required, this position is designed for a professional with a desire to become a financial advisor.

The following is illustrative of general activities of this position and does not reflect every task this position may undertake. Training and resources will be provided to assure the employee is able to accomplish what is required.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Planning Support

- Client meeting preparation
- Input financial plan data
- Meeting follow up
- Trading support
- Technology integration and oversight

Administrative

- Compliance oversight
- Account processing and servicing
- Administrative support as needed

Client Service Support

- Client account maintenance
- Service request support
- Cost basis support

Executive Support

- Assist Advisors with special projects
- Research support
- Social media support

QUALIFICATIONS

Education/Certifications

- College degree in industry-related field preferred
- Increased responsibilities may require licenses/certifications

Experience

- Industry experience a plus
- Background in or knowledge of financial services industry helpful

Knowledge, Skills, and Abilities

- Ability to handle confidential and sensitive information
- Ability to work in a team environment with a client-centric focus
- Strong organizational and project management skills with ability to multi-task
- Ability to establish appropriate timelines and manage multiple deadlines
- Well-developed professional, interpersonal and communication skills with minimum supervision needed
- Knowledge and proficiency of MS Office applications and the ability to learn other software including eMoney, Orion, and Redtail

HOW TO APPLY

In addition to your resume, please provide a one paragraph (150 word limit) response to each of the following questions below. Email this and your resume to anthony@onedegreeadvisors.com. For more information about our firm, visit www.onedegreeadvisors.com.

1. Tell us about yourself!
2. Why do you want this job and what do you bring to One Degree Advisors?
3. Tell us about the person(s) or event that has most impacted who you are now.
4. If we have three qualified candidates with similar qualifications, tell us why we should select you for this position.