Wealth Advisor

Ancora is looking to add an experienced Wealth Advisor who is focused on high net-worth private clients and smaller institutions. The incumbent should be skilled at building client relationships and have a proven ability to generate new business. He/she should possess strong skills in understanding the capital markets.

Location

This position is located at Ancora's Bloomfield Hills, Michigan office.

Duties & Responsibilities

Business Development

- Active development of new business, with the objective of meeting and exceeding individual sales target.
- Use Ancora's contact management and sales automation tools to prospect and create a new business sales pipeline.
- Pursue referral opportunities, attend community events, seminars, trade shows, work personal networks, and participate in activities that drive new business sales goals.
- Identify cross-selling opportunities and partner with Ancora personnel in other verticals of the firm to cross sell other Ancora services.

Client Management

- Review and analyze clients assets, liabilities, cash flow, insurance coverage, tax status and financial objectives in order to provide suitable recommendations for investment products and services based on client's objectives, resources, time horizon, risk profile and preferences.
- Create and deliver presentations/checkpoint meetings to existing clients on portfolio performance.
- Proactive outreach to existing clients to provide updates and gather new insights.

Compliance

- Maintain compliance with all rules and regulations in the financial industry.
- Keep current on SEC and FINRA rules and regulations that could impact client portfolios and investment strategies.

Industry Knowledge

- Have a thorough understanding of investments and the current financial environment.
- Perform market research to stay current with financial trends.

Qualifications

- Bachelor's Degree, required
- Series 6 License, required
- Series 7 License, preferred
- Certified Financial Planner (CFP) and / or CFA, consideration of achieving

- Accredited Investment Fiduciary (AIF) certification, preferred
- 4 + years of experience working in private wealth investment management channels, required
- Has an existing book $200,000 - $400,000 of recurring revenue, preferred
- High degree of comprehension of asset allocation, capital markets, bonds, securities and equity funds
- Working knowledge of relevant regulatory, economic and political environments
- Ability to address client behavioral aspects directly in relation to financial disciplines and risk mitigation
- Ability to communicate professionally and effectively with institutional and family wealth clientele
- Strong working knowledge of Microsoft Office applications and general PC skills
- High ethical standards and ability to maintain confidentiality while following organizational policies and procedures
- Team-oriented with effective interpersonal communication skills and a desire to learn and help others
- Highly organized and accountable with attention to detail and accuracy
- Ability to multi-task with a strong work ethic
- Professional appearance and demeanor

Benefits

Ancora offers a competitive salary and excellent benefit package with a culture of teamwork and recognition.

About Ancora

Ancora is client-focused and growth-oriented investment and financial advisory firm based in Cleveland, Ohio. The Firm is recognized for providing investment advisory, money management, insurance and retirement plan advisory services to individuals and institutions. Ancora promotes a friendly, family-oriented work environment and encourages our employees to strive for personal and professional growth with the highest level of integrity.

Ancora is an Equal Opportunity Employer

All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, protected veteran status, disability, or any other basis protected by applicable law.

Visit www.ancora.net for more information.

Apply

Apply online at www.ancora.net/careers or email careers@ancora.net.

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