

## Financial Advisor

Ancora is seeking a motivated, dynamic, forward-thinking Financial Advisor with strong client-focused experience in a financial setting for a position located in the Bloomfield Hills Michigan office. The role offers unique growth potential for those interested in the industry.

This is a fantastic opportunity for a growth-oriented professional to gain valuable exposure to an extraordinary workplace and clientele.

### Job Purpose:

The primary job function is to generate new business through the analysis, development and implementation of financial plans aimed at the achievement of long-term and short-term financial objectives for institutional and family wealth clientele.

### Duties and Responsibilities:

- > Active development of new business.
- > Review and analyze 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.
- > Implementation of financial plan as selected by clients.
- > Preparation of performance reports and presentation to clients.
- > Ongoing strategic development of financial portfolios for institutional and family wealth clientele.

### Qualifications:

- > Minimum of Bachelor's Degree required, Master's Degree preferred.
- > Minimum 5 years of industry experience.
- > CFA Level 1 or higher.
- > Working knowledge of Microsoft Office, MoneyGuide Pro and eMoney programs.
- > High degree of comprehension of asset allocation, capital markets, bonds, securities and equity funds.
- > Ability to communicate professionally and effectively with institutional and family wealth clientele.
- > Working knowledge of relevant regulatory, economic and political environments.
- > Ability to address client behavioral aspects directly in relation to financial disciplines and risk mitigation.
- > High degree of organizational skills, accountability, accuracy, competence and attention to detail.
- > Ethical standards and principles.
- > Excellent written and verbal communication skills.
- > Ability to follow organizational policies and procedures.
- > Professional appearance and demeanor.



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**About Ancora:**

Ancora is a successful, client-focused and growth-oriented independent investment and financial advisory firm. We offer a competitive salary, excellent benefit package and culture of teamwork and recognition.

*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.

**What Our Employees Say:**

*"I truly feel valued as an employee. I am part of a team in which everyone has each other's back."*

*"As an organization we try to be great, and I find that very motivating."*

*"Our leadership is always visible and engaging with everyone who works here. They make everyone feel like part of the success of our team."*