

FINANCIAL ADVISOR JOB DESCRIPTION

49 Financial is a financial planning firm founded in Austin, TX. We currently have offices in Austin and Dallas, Houston, and Atlanta.

At 49 Financial, we implement "Two are Better than One" in everything we do. Our firm strives to provide you the support that you need when getting started in this challenging industry and career. Through our training, mentorship, and leadership development programs, we accelerate your learning experience so you're well-equipped to create substantial impact.

We believe in the power that comes from planning for finances together, rather than alone, for both our clients and our associates.

Job Description

- Build and maintain relationships with clients through our unique meeting process and periodic reviews.
- Analyze financial information from clients to determine strategies to help meet their financial objectives.
- Provide knowledgeable, objective financial guidance and customized strategies to individuals, families, and business owners.
- Advance the firm's mission of revolutionizing the industry by embodying the firm's core values: conviction, gratitude, loyalty, integrity, and teamwork.

Qualifications

- Highly motivated, self-starter who possesses our core values, a strong work ethic, and the desire to always put others before themselves, all with the end goal of making an impact on lives, primarily through financial services.
- Has the respect of family, friends, and peers.
- Team player who possesses excellent interpersonal skills and communication abilities.
- Must be authorized to work in the United States
- A four-year college degree is preferred and relevant professional FINRA securities registrations are a plus. If you do not have the following, you will be required to attain them, under the sponsorship 49 Financial: state life and health licenses, FINRA Series 7 and 63/66 registrations.
- MBA, JD, CFP®, CPA or ChFC are all a plus.

Individuals who excel at 49 Financial come from many different professional backgrounds besides Finance, including but not limited to:

- Law
- Banking
- Management
- Marketing
- Communication
- Economics