POSITION SPECIFICATION – NEW BUSINESS DIRECTOR, INVESTMENT ADVISOR

THE COMPANY

Atlas Advisory Group, LLC assists affluent individuals and families with life insurance, investment management, and estate planning solutions designed to help maximize their income in retirement and ultimately transfer their legacies to future generations in the most efficient manner.

With a team of dedicated professionals and extensive experience in the industry, Atlas Advisory Group is committed to working effectively with attorneys, accountants, and a financial team to design and implement efficient, long-term wealth management strategies for our clients.

MISSION

Atlas Advisory Group exists to provide the finest wealth management, protection, and creative solutions for our clients, who value a long-term relationship with a team of dedicated professionals.

VISION

Atlas Advisory Group's objective is to be the premier choice for service and financial solutions within the insurance and wealth management industry.

VALUES

- Quality – We strive to provide the best solution for each client, every time.
- Teamwork – We leverage our strengths, working in an efficient, profitable manner.
- Integrity – We set realistic expectations with our clients and ourselves.
- Excellence – We strive to exceed the expectations of our clients, providing opportunity for mutual success.
- Client Focus – We put the client first in all we do.

Affiliation

Atlas Advisory Group is a member of M Financial Group, a national network of independent privately-owned insurance firms created to serve the needs of affluent families and their professional advisors.

M Financial Group is one of the nation’s premier financial services distribution companies, serving affluent individuals, corporate executives, entrepreneurs and Fortune 1000 companies through an exclusive network of more than 130 carefully chosen independent, successful and innovative financial services firms who own the company. Member Firms are committed to serving their clients in the most ethically responsible and strategically sound manner.

Founded in 1978 on the revolutionary idea that individual success could best be achieved through collective efforts, the Member Firms of M Financial Group work together to make each other even more successful and share a common focus: to offer a broad range of insurance, investment and executive benefit solutions designed to help clients meet their financial goals. M Member Firms have the best of both worlds – access to the resources of a large organization of leading financial services firms and the independence to serve the best interests of their clients.

THE POSITION – NEW BUSINESS DIRECTOR, INVESTMENT ADVISOR

Responsibilities

As the lead marketer and investment advisor, you will identify, target, acquire and provide clients with comprehensive financial planning and advice to help them effectively manage their financial wealth. Responsibilities include targeting centers of influence and prospective clients by marketing our unique value proposition, evaluating client's financial situations, and identifying investment objectives through a comprehensive and customized financial planning process. You will recommend appropriate solutions and monitor portfolios for economic changes and adjustments in your client's needs and objectives. This is a very visible role focused on building and maintaining relationships with clients and the local advisor community.

More specifically, responsibilities include:

- Generate leads through personal and professional contacts for the development of relationships with individuals, business owners, and/or corporations.
- Maintain a tracking system to monitor sales activities including initial calls to potential clients, calls/meetings with advisors, existing clients, and other sources of referrals and leads for new business opportunities.
- Manage new business through marketing, research, analysis, and delivery of client presentations.
- Assess clients' assets, liabilities, cash flow, insurance coverage, tax status, and financial objectives and values to establish financial goals and investment strategies.
- Advise clients on financial plans utilizing knowledge of tax and investment strategies, securities, insurance, pension plans, and real estate.
- As part of the Atlas team, develop and maintain strong client relationships through periodic communications and reviews to discuss potential opportunities within the Atlas suite of services.
- Assist in the overall strategy and management of the current investment client book of business.

- Identify new cross-sales opportunities through business development calls and meetings.
- Maintain knowledge and expertise of accounting, investments, legal, and tax issues and their impact on existing and future business.
- Participate in industry meetings to maintain contemporary knowledge of current trends and products.

THE CANDIDATE

Education/Certifications

- Bachelor's degree is required and it is more than likely that the successful candidate will possess an advanced business, accounting or legal degree.
- It is likely the successful candidate will have (and/or work towards acquiring) a professional certification such as a CFP.
- Required licenses: FINRA 7 and 63

Professional/Personal Qualifications

To perform the role successfully, able to demonstrate the following competencies or experiences:

- Fits the values and culture of the firm and enjoys collaborating and mentoring with a dedicated team of professionals.
- Demonstrated success in building assets by generating leads, opening new accounts and advising an established client base.
- Experience and success identifying client needs, analyzing customer information, defining investment goals and objectives, and creating wealth management solutions using various trust structures.
- A recognized investment advisor, who possesses a strong, positive reputation, has a solid track record and an established professional presence that generates confidence in co-workers, as well as clients.
- Excellent communications skills, written and verbal, both internally and externally. Effective in a variety of presentation settings, one-on-one, and small and large groups. Congenial, yet highly professional in style, proactive in nature and demeanor
- Well-versed in the financial services industry, strong technically but able to talk to clients at all levels.
- Significant experience in the development of strategic alliances and partners to develop high quality business leads.
- Significant knowledge of the financial services industry and marketing.

- A self-starter who needs little or no direction and who would enjoy working in a highly professional, entrepreneurial culture with minimal bureaucracy and high levels of collaboration.

CONFIDENTIAL CONTACT

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