



## Financial Advisor

***Job Type: Full Time***

Berger Financial Group, a private RIA, is looking for a Financial Advisor to add to their growing team and be the lead advisor on an established book of business. This Advisor will be the clients' trusted advisor in areas including investment management, financial planning, and cash flow, among others. The Financial Advisor should have a charismatic personality, communicate clearly and have previous significant experience in financial planning and business development. Previous client base not required but if exists, compensation can be negotiated for it. If you're a people person, analytical, meticulous and customer-oriented, we'd like to meet you. Your goal will be to establish personal relationships with existing clients and guide them on decisions to meet their financial goals.

### Job Description

- Interact and engage with clients in a positive relatable fashion
- Responsible for financial research and analysis
- Prepares financial and business-related analysis and research
- Financial research, review and analysis
- Discuss client preferences for comprehensive financial planning
- Be comfortable discussing strategies on: Investments, Cash Flow, Tax planning, Insurance, Estate planning, among others
- Investment recommendations
- Finalize strategic financial plans
- Monitor the performance of clients' plans, and provide comprehensive reports on a regular basis
- Answer questions and adjust plans as necessary

### Basic Qualifications

- BS/BA in accounting, finance, business administration or relevant field
- 5+ years of experience in a financial planning role
- Strong ability to analyze market's financial data and provide adequate financial advice
- Charismatic personality
- Excellent communication and interpersonal skills
- Attention to detail and analytical skill-set

**Location**

South Burlington, Vermont

Submit resume and cover letter to [info@bergerfinancial.com](mailto:info@bergerfinancial.com)