Birmingham, AL- *Associate Advisor*

For a video position description click here https://youtu.be/nQVscXeZV78

- Email for a primary contact: candidate@newplannerrecruiting.com

What we are offering:

We are a professionally managed financial planning and wealth management firm based in Birmingham, AL seeking an Associate Advisor to join our team. The focus of an Associate Advisor is to prepare, attend and execute follow up work for client meetings. This is a professional support position in a client-focused environment. This position is designed to provide the right candidate a career path leading to a Relationship Manager position after 5 to 10 years.

We are passionate about helping people succeed. We have developed 5 Core Values that are the focus of how we hire and promote within our firm. A candidate seeking a position at BCR Wealth must possess the same values.

Core Values:

- Over-delivers for clients through processes
- Independently team focused
- Takes personal responsibility
- Goal Oriented
- Growth through knowledge and service

What we seek in a candidate:

- Bachelor's degree from an accredited institution
- Existing Series 65 preferred, or obtain within 90 days of joining firm
- Ability to perform at a high level while multi-tasking
- Demonstrates an organized approach to tasks with a sense of urgency
- Able to work both independently and in a team setting
- Must be a self-starter, problem solver and a goal-oriented team player with a 'no job is beneath me' attitude
- Must be willing to travel on occasion for training opportunities
- Experience with Redtail, Raymond James (custodian), Portfolio Center, Boss, MorningStar, Money Guide Pro, is a plus!

Position perks:

- Competitive salary
- Participation in company 401k plan
- Generous Personal Time Off policy
- Paid holidays
- Eligible for paid professional development budget for CE, conferences and training