Investment Advisor

Liberty Wealth Advisors

www.libertywealthadvisors.com

Position Available: Investment Advisor

Location: Stamford, CT

Liberty Wealth Advisors is an independent financial planning and investment management company based in Stamford, CT that serves both individuals and businesses. Our team of investment professionals has been providing personalized financial planning and investment advice to clients nationally for over 25 years. The firm is registered with the Securities Exchange Commission as a registered investment advisor. Our investment professionals hold the Certified Financial Planner® (CFP) designation.

Job Description:

Liberty Wealth Advisors is seeking wirehouse and independent financial advisors to join our firm.

This is a great opportunity for an entrepreneurial and independent Financial Advisor who wants to provide the highest level of service to clients in an environment that offers you maximum support and a state-of-the-art technology platform. We are a hybrid advisory firm with both a RIA model and a broker/dealer model. Advisors from both wirehouse and independent brokerage settings will appreciate the high-end boutique culture that emphasizes an extremely attractive compensation structure.

Primary duties include:

- Developing and maintaining relationships with high net worth clients with at least $1 million in investable assets.
- Understanding and articulating client investment issues effectively, using a team approach.
- Identifying and presenting financial solutions in the areas of financial planning, investment management, and retirement planning to clients and prospects.
- Providing high-touch client service to existing and new client relationships.
- Communicating LWA's investment management process and extensive planning services to current clients and prospects.
- Working with external centers of influence to cultivate and identify prospects.

Job Requirements:

- 5+ years of Financial Advisor experience.
- Impeccable character and integrity.
- Sales experience at a RIA, independent brokerage, wirehouse or regional firm.
- Strong business development and client service skills.
- Minimum of $50 million transferrable book of business.
- Established network of external referral sources and centers of influence.
- Series 7, 66 (or 63, 65) licenses required.
- CFP, JD, CPA, MBA preferred.

Salary: Compensation and benefits are highly competitive.

Submit resume to: James S. Gladney, Managing Partner, Liberty Capital Partners via email at jgladney@libertycapitalpartners.com or call 203-323-6666 ext. 230.

www.libertycapitalpartners.com

Liberty Wealth Advisors is an equal opportunity employer.