



## Service Advisor for Next Phase Advisory Group

### OVERALL FUNCTION

This position has responsibility for managing, servicing & expanding existing client relationships while formulating and implementing advice.

#### BRAND AMBASSADOR

- Present a positive and polished image of Next Phase Advisory Group
- Reinforce the previous planning successes & encourage growth in the client relationship

### CUSTOMER FOCUS

- Is dedicated to exceeding client expectations, ask engaging & forward-thinking questions; gets first-hand client information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect
- Make proactive recommendations for adjustments to the customers financial plan, risk products and investment products
- Ability to network and ask for referrals to expand clientele

### TECHNICAL EXPERTISE

- Take on new work or projects outside to learn, grow and expand the area of your expertise.
- Knowledgeable about how organizations work; knows how to get things done both through formal channels and the informal network; understands the origin and reasoning behind key policies, practices, and procedures; understands the cultures of organizations.

### QUALIFICATIONS

- Series 6, 63, & 7 licenses,
- Life & Health licenses
- The following designations are desired: ChFC or CFP for prerequisite & requirement after 5 yrs of employment
- 3 + years in securities industry with experience in advisory or wrap programs required
- Trading experience, ability to process personal securities transactions
- Familiarity with Microsoft applications and data entry and information retrieval software
- Excellent oral and written communication skills
- Strong critical thinking, financial analysis and problem-solving skills required
- Ability to manage multiple diverse projects and assignments in a timely and quality manner
- Strong attention to detail with the ability to work with a high degree of accuracy
- Demonstrated ability to maintain effective working relationships with clients
- Ability to look beyond the obvious and not stop at the first answers
- Willingness to learn
- Ability to embrace change and work in a fast-paced environment
- Able to work both independently and in a team
- Ability to maintain confidentiality

Please submit resumes (with cover letter) to [phil.roberts@nm.com](mailto:phil.roberts@nm.com)