Girard is a full-service, wealth management firm backed by the strength and stability of Univest Financial – a trusted institution with a 143-year history. We provide independent advice and customized wealth solutions to individuals, businesses, and charitable institutions, to help meet their investing and financial planning goals. We are seeking for immediate hire a **Wealth Advisor** in the **Lancaster, PA area**.

This individual is expected to be accountable for the acquisition of new business / revenue for an assigned geographic footprint. Within this footprint, the Business Development advisor will be responsible for marketing Girard's offering in asset management, financial planning, insurance, and trust solutions to centers of influence and assigned internal partners.

Responsibilities Include:

- Accountable for generating new business critical to Girard's growth and managing a pipeline of opportunities.
- Develop, maintain, and expand a network of key COI's to identify new business.
- Create and implement strategy to manage and maximize referrals.
- Identify and refer new client leads from personal and preexisting client relationships.
- Present relevant subject matter on as needed basis to prospective/existing clients, referral sources, and COI's.
- Assist in coaching, mentoring, and providing development support to associate and support advisor roles.
- Participate in the design and implementation of key marketing initiatives and activities.
- Co-host client events to generate referrals and leads.
- Partner with Relationship Manager for ongoing management and servicing of new client relationship
- Remain involved in key relationships.
- Coordinate and partner with other teammates for key prospect or client relationships.
- Leverage Salesforce CRM to manage sales process and report prospect pipeline
- Responsible for compliance with laws and regulations that apply to this position, including the Univest Code of Conduct
- Perform additional duties as required

Qualifications:

- Bachelor Degree in business, finance or related field
- Proven track record of developing new client relationships utilizing a consultative sales approach.
- Series 7, 66 or 63/65 registration
- CFP preferred, CFA or CPA also desirable
- Experience in managing sales cycle utilizing CRM systems, preferably Salesforce.
- Influencing skills to drive results working with internal partners.
- Coordinate and partner closely with other team members.
- Self-starter with the ability to set priorities, manage, responsibilities, and exceed client expectations.

Interested? **Apply today** by emailing your resume to **HR@MeetGirard.com.**

Equal Opportunity Employer/Minority/Female/Disability/Veteran