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 **King of Prussia, PA**.

This is individual is expected to serve as the primary relationship manager and investment professional for key client relationships. The relationship manager is expected to drive loyalty and focus efforts to expand wallet share and generate client referrals, incrementally.

Responsibilities Include:

- The wealth advisor is the lead for all financial and planning services for our clients, leading the team in the delivery of services designed to retain clients and expand wallet share.
- Deliver exceptional service and create extraordinary experience with our clients while helping them reach their long term financial goals.
- Assist business development advisor with final prospect meetings and communicate the investment process in sales presenations.
- Coordinate client events focusing on specific wealth topics of interest.
- Develop and present client focused advice solutions.
- Manage and execute client servicing standards by scheduling, preparing, and conducting periodic client meetings, which include the analysis and presentation for financial planning, investment recommendations and portfolio reviews.
- Manage client portfolios to model and target allocation.
- Maintain up-to-date awareness of clients' wealth management issues and needs, anticipate clients unspoken needs.
- Cultivate client 'next generation' and familial relationships.
- Provide coaching, mentoring, and development support to associate and support advisor roles
- Maintain records in customer relationship management system with all client interactions.
- Assist in coaching, mentoring, and providing development support to associate and support advisor roles.
- Assume additional responsibilities as needed.

Qualifications:

- Bachelor Degree in business, finance or related field
- Proven track record of developing new client relationships utilizing a consultative approach.
- Series 7, 66 or 63/65 registration
- CFP preferred, CFA or CPA also desirable
- Ability to work in a team environment
- 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.
- Strong investments and capital markets knowledge
- Experience in positioning and connecting a variety of solutions
- Familiar with financial statements and advanced financial planning software.
- 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