Financial Advisor - Tampa, Florida - $200k (base and bonus)

Company Overview:
With almost $2B in AUM and AUA, Trajan® Wealth is excited to announce a rare advisor opportunity.
Not only are we one of the fastest growing RIA firms in the country, but we are also one of the few firms with a full-service law firm in house; Trajan Estate.
We provide financial services on a fee-only basis, acting as a fiduciary for our clients. Each member of our team fully embraces the importance of this role and what it means for our clients. Additionally, we solicit fixed insurance such as Fixed Index Annuity products. The decisions we make and the advice we provide are always in our client's best interest. Our disciplined and objective investment and financial planning process provides trust and the peace of mind which is so highly valued. This is what it truly means to be a fiduciary. We live it! Our average advisor produces $40M per year in new assets.

What Makes Us Different:

- Do what you do best; meet with and sell clients who are excited to meet you.
- We have an in-house marketing agency that focus on radio, seminars, digital and more.
- You have a team that sets 5 to 15 prospect and client appointments per week every week.
- You have an organization supporting you - Client Development, Client Services, Client Relationship Mgmt, Investment, IT, HR, and Compliance!
- Forget prospecting! Finally do what you do best, leave the minutia to your team!
- Regular business hours so you can get your family and personal life back.
- Turn key proven sales process and presentation that clients (and advisors) love.

We have hearts of teachers with leads and prospects that want to speak with us. Build a career with a company that cares!

Primary Responsibilities:

- Develop a client base by building lasting, meaningful relationships with the leads we provide and appointments we set
- Conduct meetings with clients/potential clients to evaluate financial needs and educate them on AUM, Annuity, Private Equity and Trusts
- Create and implement customized financial plans/strategies to enable clients to reach their goals and objectives

Experienced. Discreet. Independent.

Qualifications:

- Clean Broker Check
- Bachelor's degree or equivalent experience
- Financial designation doesn't hurt
- Securities licenses/Certification - Series 65 or Series 66 or CFP
- Life and Annuity license
- Minimum of 7 to 10-years of financial investment advisor experience
- Minimum of 3-years of experience utilizing a CRM system; Salesforce preferred
- Proficient in Microsoft Office
- Strong interpersonal skills
- Excellent written and verbal communication skills
- Proactive style
- Service orientation and strong code of personal ethics

Compensation Package:

- $200,000+ per year *(average)* which includes high base salary, bonus and commission income
- Employee not Contractor
- Matching 401(k)
- Stock Option Plan
- 100% Company paid Medical for employee
- Dental, Vision, Life Insurance, Short Term Disability and many other options available

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