



Relationship Manager Scottsdale AZ 90K plus

Overview

We are a fast paced and growing organization that not only works hard, but we have fun as well. Our company culture is exciting and based on the "Golden Rule" in mind...go out of your way solve other people's problems. We have hearts of teachers to support our clients. We are looking for a candidate who is local to Arizona and is willing to work in the office full-time to listen, learn, and help colleagues. The RM role is critical to maintain and continue the relationship that the Sales Advisor has established. A technical understanding of the financial markets and retirement planning is a must, as well as a deep desire toward client-centric service. We distinguish ourselves by focusing on clients, visions, and dreams, and continually tracking clients progress.

Responsibilities

- Virtual and by phone meetings with clients to discuss progress.
- Learn the Trajan Wealth way of putting clients first.
- Conduct reviews and periodic "check-in" calls with clients
- Uncover Estate Planning needs and schedule Estate Appointments with attorneys
- Retirement Planning as needed
- Investment Tax Planning as needed
- Holistic approach which includes evaluating external and 401(K) assets.
- Other duties as required

Qualifications

- Clean U4
- Financial designation preferred; CFP, CFA, CIMA
- Securities licenses/Certification - Series 65 or 66
- Arizona Life and Annuity License - desired
- 5+ years of financial investment advisor experience preferred
- 3 years of experience utilizing a CRM system; Salesforce preferred
- Proficient in Microsoft Office
- Strong interpersonal and analysis skills
- Excellent written and verbal communication skills
- Proactive

Benefits

- Competitive Salary - base plus bonus
- 401k with matching component
- United Healthcare PPO Medical employee coverage paid by Company
- Delta Dental and UHC Vision
- Life Insurance, Short-Term and Long-Term Disability options available and much more
- Generous holidays and PTO

Experienced. Discreet. Independent.