

March 22, 2021

## Job Description

JNBA Financial Advisors is searching for an Advisor Associate who shares our firm's values and is passionate about helping wealth management clients achieve their financial life planning goals. This role is responsible for providing technical support and client relationship management support to advisory team members. As part of our advice driven by *advocacy*<sup>®</sup> approach, this team member is expected to take direction from Senior Advisors and Advisors on client matters and collaborate with client service team members on relationships. An important member of a client's advisory team, the Advisor Associate has frequent direct communication with clients.

A Certified Financial Planner<sup>™</sup> designation or active work to obtain this designation is required. This team member must be solution-focused and forward-thinking.

### Required Skills and Experience:

- Bachelor's Degree
- 3+ years of personal wealth management industry experience
- A Certified Financial Planner<sup>™</sup> designation or active work to obtain this designation
- A strong desire to learn JNBA's tools and processes
- Outstanding communication skills, both verbal and written
- Highly proficient with Microsoft Office (Excel, Word, Outlook) and other software applications

Demonstrated professional track record of operating in alignment with our organizational values of:

- Guarding confidentiality
- Being accountable
- Collaborating for the common good
- Striving to continually add value
- Results-driven
- Being compassionate and empathetic

About JNBA Financial Advisors - Bloomington-based JNBA is an independent fee-only wealth management firm that has worked exclusively for clients for over 40 years. As a nationally recognized Registered Investment Advisor (RIA), our culture and team members are driven to fulfill our fiduciary duty by acting in our clients' best interests at all times. Our advisory teams help guide people through life's most important decisions by delivering customized life planning strategies and solutions to optimize their resources. JNBA's higher standard of service has contributed to 96%+ client retention since we began tracking in 2001.

Salary & Benefits - JNBA is a growing company that offers competitive salary and benefits based on experience and qualifications.



To learn more about JNBA, please visit our website at [www.jnba.com](http://www.jnba.com). Interested applicants should send their resume and salary requirements. Resumes will not be accepted without a cover letter that states why you would be a good fit for this position and the compensation range you wish to discuss. Also, in your cover letter, please describe your three most defining characteristics or attributes. This request is intended to showcase your writing skills as well as help us to get to know you. Thank you for your interest in joining our JNBA team!

Job Type: Full-time

Application Questions:

- How many years of wealth management experience do you have?
- What is the highest level of education you have completed?
- Are you authorized to work in the following country: United States?
- Are you willing to undergo a background check, in accordance with local law/regulations?

Apply by emailing [jnbacareers@jnba.com](mailto:jnbacareers@jnba.com)