Nicollet

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INVESTMENT MANAGEMENT, INC.

Position Objective:

Nicollet Investment Management is a long-established RIA firm in the Minneapolis area with a strong team approach and a disciplined strategy for helping our clients succeed in reaching their own financial goals. We are looking for an additional experienced adviser to provide financial planning, investment planning, new business development and related services to individuals, families, and organizations.

Responsibilities:

Financial Adviser Services and New Business Development

- Identify and assist with onboarding prospective new clients through personal and professional contacts, and other community involvements.
- Serve as secondary adviser and contact for new and assigned client relationships, helping primary adviser build investment and financial plans and ongoing review and oversight.
- Serve as primary adviser and contact for new and assigned individuals, families, and organizations. Provide customized plans and services helping clients meet their near-term and long-term personal financial and investment goals, including periodic reviews and assessments of changing needs and circumstances.
- Assist with firm's efforts to improve financial planning, investment advising and client service processes.
- Work with other firm advisers on assigned projects related to client service, financial planning and investment management.

Qualifications:

Minimum:

- BA or BS degree
- 3+ years of experience serving as investment adviser for clients
- 3+ years of experience performing financial planning services for clients
- Business development experience with desire to help firm grow and prosper
- Commitment to regulatory compliance with no negative history
- Excellent written and verbal communication skills
- Pleasant, upbeat interpersonal skills with clients and peers
- Works well independently and in a team environment with other experienced professionals
- Strong technical and analytical skills related to investment advising and financial planning
- Proficient with Microsoft Office and other financial related software applications

Preferred:

- Certified Financial Planner™ or CFA designation completed or in progress
- Experience serving clients with moderate and more complex financial circumstances
- Opportunity to transition existing clients over 1-year period

Salary & Benefits:

Base salary commensurate with experience, qualifications & performance.
Bonus opportunity is available
401(k) Plan
Private office space

Contact: To apply, please submit the following items to **march@nicolletinvest.com** for consideration:

- Brief letter of introduction
- Resume
- Minimum salary expectations

Nicollet Investment Management, Inc. is an Equal Opportunity Employer.