GREENSPRING

Position Description: Financial Advisor

Job Title	Financial Advisor
Dept/Division	Private Client Group
Date	Summer 2015

Purpose	The Financial Advisor will work in conjunction with the Lead Advisors to determine the financial needs of clients and to provide advice and make recommendations on products and services that best meet their needs. Duties include assessing clients' assets, liabilities, cash flow, insurance coverage, tax status, and financial objectives to establish investment strategies. The candidate will be servicing the clients of Lead Advisors at the firm.

Core Position Competencies

Focusing on the Client	Shows empathy, concern, and genuineness in all client interactions. Ensure that the clients' needs are met and service expectations are exceeded. Reaches out to be helpful in a timely and responsive manner. Strives to satisfy one's external and internal customers.
Communicating & Collaborating	Speaks and writes clearly and effectively. Listens and asks questions to ensure understanding. Tailors communication style and message to the purpose and audience. Values and respects the opinions of others and seeks input from co-workers. Resolves conflicts or disagreements in a respectful, professional manner. Establishes a positive, inclusive atmosphere that reinforces collaboration and teamwork, whether with peers, or superiors. Supports an atmosphere that reinforces collaboration and teamwork. Is viewed as approachable by team members and is willing to share knowledge with others. Is flexible, open and reception to new ideas and approaches.
Planning & Organizing	Prioritizes time well and handles multiple demands and competing priorities. Adapts to changing priorities, situations, and demands. Engages in problem-solving; suggests ways to improve performance and be more efficient. Proactively communicates with coworkers, while balancing the need to seek input and information with the need to make a decision. Manages time effectively and accomplishes all tasks and responsibilities in a timely and accurate fashion. Pays close attention to detail.
Exhibiting Motivation & Commitment	Shows initiative, anticipates needs and takes action. Demonstrates accountability in all work responsibilities. Exercises sound and ethical judgment when acting on behalf of the firm. Exercises confidentiality in all aspects. Shows commitment to work and to consequences of own actions. Strives to achieve individual, departmental and firm-wide goals. Seeks and acts upon performance feedback.
Technical Expertise	Understands personal financial planning concepts in areas such as cash flow planning, income tax, estate tax, retirement planning, investment analysis, and risk management strategies.

Job Requirements

Industry/Business Experience	Minimum 1-2 years experience working in financial service industry
Education	Bachelor's degree required Certified Financial Planner or currently working towards this designation
Licenses	FINRA Series 65 desired
Skills & Knowledge	Focus on client needs and customer service Detail oriented Strong organizational skills with a proven ability to multi-task and manage multiple projects A team player with good interpersonal skills and the ability to work collaboratively across departments Excellent oral and written communication and presentation skills Demonstrated analytical skills, problem-solving abilities, and attention to detail Ability to excel in a fast-paced, changing environment Excellent interpersonal skills and ability to be highly relational with clients and staff A self-starter who is assertive, independent, and a global thinker

Company Profile

Greenspring Wealth Management is a fee-only financial planning and private money management firm located in Towson, Maryland. Our Private Client Group primarily works with individuals and families with a net worth of $2 million and above who engage us to provide Financial Planning and comprehensive Wealth Management Services. Our Institutional Services Group provides Independent Fiduciary Services to retirement plan trustees who generally oversee plan assets between $5 million and $100 million.

Greenspring is consistently ranked as one of the country's leading independent advisory firms. We look to hire talented individuals with leadership potential, integrity, a sharp analytical mind, creativity, and the ability to work interdependently with others. We offer a competitive compensation package including:

- Health and Dental Insurance
- Disability Insurance
- 401(k) Plan with Safe Harbor Match and discretionary profit sharing contributions
- Health Savings accounts
- Paid Leave & Vacation Allowance

Please submit your resume to patrick.collins@greenspringwealth.com