GREENSPRING

Position Description: 401(k) Participant Advisor

Job Title	401(k) Participant Advisor
Dept/Division	Institutional Client Group
Hire Date	Summer 2017

Purpose	The 401(k) Participant Advisor will work in conjunction with the Lead Advisors to identify and meet the employee engagement needs of plan sponsors and their participants. Duties include traveling to client locations, conducting group and 1:1 financial counseling sessions (both in-person and online) and spearheading Greenspring's communications strategy for plan participants. Requires knowledge of personal financial planning concepts in areas such as cash flow planning, income tax, estate tax, retirement planning, investment analysis, and risk management strategies.

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.

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Job Requirements

Industry/Business Experience	Minimum 2-3 years' experience working in financial service industry.
Education	Required • Bachelor's degree Preferred • Certified Financial Planner® or currently working towards this designation • Accredited Investment Fiduciary® or currently working towards this designation • Chartered Retirement Planning Counselor℠ or currently working towards this designation
Licenses	Series 65 or 66 (or CFP®)
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 • Willingness to travel

Company Profile

Founded in Baltimore in 2004, Greenspring has been recognized as one of the country's leading and fastest-growing registered investment advisors (RIAs). The firm has also been recognized as one of the industry's top retirement plan advisors and provides comprehensive advice to corporate and non-profit clients on their retirement programs including fiduciary governance, investments, fees, plan design, provider management, participant education and advice, and plan committee formation and training.

We look to hire talented individuals with leadership potential, integrity, a sharp analytical mind, creativity, and the ability to work interdependently with others. If you believe you have what it takes to make meaningful contributions to our team, we'd like to hear from you. Please submit your resume to careers@greenspringwealth.com for consideration.

Competitive Benefits

- Access to Health and Dental Insurance
- Disability Insurance
- 401(k) Plan w/ Safe Harbor Match and discretionary profit sharing contributions
- Health Savings Accounts
- Paid Leave & Vacation Allowance
- Continuing Education Allowance