

Associate Advisor/Registered Assistant Investment and Wealth Management

SEIA is a wealth management firm located in Century City, CA. We provide an extraordinarily high level of investment and wealth management support to a large and affluent group of clients. We are seeking an experienced advisor to serve as relationship manager to the clients of one of our senior partners.

Responsibilities:

- ◆ Independently serve and grow existing investment clients
- ◆ Quarterback planning, implementation, and service details
- ◆ Conduct investment reviews
- ◆ Respond to service issues
- ◆ Maintain client and practice management data

Qualifications:

- ◆ 2-5 years experience in an investment, financial planning, or wealth management firm
- ◆ Exceptional organization and follow-through skills
- ◆ Ability to anticipate and solve problems
- ◆ Series 7 and 63 and Life insurance license
- ◆ Commitment to professional development

We Offer:

- ◆ Extremely competitive salary + incentive
- ◆ A career path into production *or* the ability to remain in a relationship management role while growing skills and compensation