

Relationship Manager/Financial Advisor 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 our existing client base and also potential clients through our nationwide sales force.

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:

- ◆ 3-10 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 66
- ◆ CFP or CFA designation preferred
- ◆ Commitment to professional development

We Offer:

- ◆ Extremely competitive salary + incentive
- ◆ A career path into production *or* the ability to remain in a relationship management
- ◆ Pay for industry designations and licenses plus compensation for attaining them