Client Advisor

Department:	--
Business Unit(s):	Private Client
Reports To:	Chief Operating Officer, SAGE Private Wealth Group

Since our launch in November 2011, SAGE Private Wealth Group has grown to become the largest Raymond James Financial Services office in the state of Illinois, based on client assets (as of 12/31/17). As fiduciaries, our team provides a Wealth Management Standard of Care which is a holistic and client-centered approach aimed at delivering Service Excellence which requires the attention of a specialized, responsive and ethical team of professionals.

Our Mission is to build and protect our clients' investment legacy so that they are free to pursue noble intentions – whether it is to leave this world a better place, enrich the lives of those they touch or serve as a catalyst for the greater good. We further this sentiment by donating a dime of every dollar of our profit to our own foundation, the SAGE Private Wealth Group Foundation. Our foundation is focused on funding organizations that empower women and children through education and micro-finance. Find out more by visiting our website at SAGEpwgfoundation.org

SAGE offers a competitive total compensation package which includes salary and bonus opportunity, benefits, unlimited time-off, a clear and defined career growth opportunities and a path-to-partnership.

We are interested in speaking with talented individuals who possess high energy and ambition, natural leadership traits and an ownership mentality. We seek a person who is coachable and who has a genuine interest in serving clients. SAGE is growing and this role will be based out of our new corporate offices in beautiful Oakbrook Terrace, Illinois known for fantastic dining, shopping and an outstanding quality of life.

Job Description

Client Advisors (CA) oversee and deepen relationships with clients by providing fiduciary fee-based investment management, comprehensive financial planning and dedicated service excellence to help families pursue their financial and life goals. As a CA with SAGE, you will work in a collaborative team environment as well as one-on-one with clients, and prospective clients, to develop tailored financial plans. You will work closely with the Investment Committee and the Financial Planning department to meet client objectives while delivering service excellence.

Job Responsibilities

As a Client Advisor with SAGE, you will evaluate clients' financial needs and goals, while identifying their available resources in order to develop and deliver a comprehensive financial plan. While we will coach and mentor in each of these areas, you must have a strong understanding of the capital markets, economic principles and the primary elements of a successful financial plan.

Additional responsibilities of the Client Advisor

- Participating in training and development to continually improve your ability to provide the best advice and service for clients
- Preparing and delivering clear and effective presentations to individuals and groups
- Delivering exceptional client service in order to drive high client and high asset retention rates
- Driving organic growth by capturing a 'larger share of wallet' from client relationships
- Driving asset and revenue growth by capturing referrals from client relationships
- Adhering to all compliance/risk procedures, following corporate and industry protocols, and acting in a manner which protects the interests of the clients and SAGE at all times
- Utilizing the contact management system in order to document all client and firm activities
- Opening, transferring and closing client accounts and maintaining appropriate account records
- Operating standard office equipment and using required software applications to produce correspondence and electronic communications
- Effectively demonstrate the Core Values of SAGE in all facets of day-to-day responsibilities

Position Requirements

As a CA with SAGE, you must possess superb verbal communication and people skills. We want a teammate who shares our work ethic and our values and applies effective listening and questioning techniques when interacting with teammates and clients.

Requirements

- Minimum 4 years of experience as a Financial Advisor, Client Advisor or Wealth Advisor
- Proven and effective sales and presentation skills
- Excellent client service skills
- Energy, ambition and strong leadership traits
- Coachable with a desire to learn and grow
- Valid and unencumbered Series 7 license
- Valid and unencumbered Series 66 or equivalent license
- Life, Health and Variable Annuity license or ability to obtain license within 3 months of employment
- Clean CRD/U4 record
- Bachelor's degree
- Working knowledge of technology and planning tools sufficient to analyze and report financial data
- Proficiency with Microsoft Office Suite

Compensation

Salary and bonus

Benefits
Medical, Dental, Vision, Long Term Disability Insurance and Life Insurance

SAGE offers a great compensation package including full benefits, competitive salary and a great career path. SAGE is the largest Raymond James Financial Services office for assets under management currently in the state of Illinois (as of 12/31/17). SAGE associates participate in a culture that is governed by a deep conviction that puts others first. Whether it be interacting with clients, fellow SAGE colleagues or other firms, we strive to conduct ourselves with integrity, honor and respect. We strive, also, to deliver service excellence through the SAGE Wealth

Management Standard of Care as we work to grow and protect your investment legacy. Find out more about us on our website at www.SAGEprivatewealth.com.

SAGE Private Wealth Group is not a registered broker/dealer and is independent of Raymond James Financial Services. Securities are offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment Advisory services are offered through SAGE Private Wealth Group and Raymond James Financial Services Advisors, Inc.

SAGE currently has two Illinois office locations in Oakbrook Terrace and Park Ridge. Please send a resume and a cover letter summarizing your experience to careers@sageprivatewealth.com. Explain why you are interested in this position and SAGE Private Wealth Group. SAGE Private Wealth Group, One Lincoln Centre, 18W140 Butterfield Rd, Suite 1160, Oakbrook Terrace, IL 60181; Phone: 630.933.0000. Applicants for employment who need accommodation should contact Human Resources prior to coming in for their interview: careers@sageprivatewealth.com.

We act with purpose, are intentional with our advice, and serve as a catalyst to help you create your lasting legacy.

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