



RETIREMENT SOLUTIONS INC.
Discover your possibilities

Wealth Advisor -- Retirement Solutions, Inc. -- Carlsbad, CA

The Wealth Advisor will be expected to perform comprehensive financial planning and investment advisory services. Responsibilities will include advising their clients on financial related issues, developing a written financial plan, make appropriate recommendations, design and construct fee-based investment portfolios. The desired individual should have a practice or book of business, a clean U4, Series 7, 63, and 65 with CFP® certification, and insurance licenses.

Retirement Solutions will be looking for candidates that possess similar financial planning and investment management philosophy. The ability to professionally interact with high net-worth clients is a must. In addition to creating and monitoring a comprehensive financial plan, the position requires an ability to prospect and provide proactive, high touch service to their clients. The candidates should have connections to existing network of potential referral sources and to maintain an active presence in networking and professional organizations. It is mandatory for this person to have excellent interpersonal and organizational skills, a client service attitude, and a burning desire to succeed. Qualified candidates must have expertise with financial planning software.

We have been offering wealth management solutions to clients in the North San Diego County area since 1985. If you want to join a firm that is focused on developing great relationships with clients, providing excellent service, and offering advanced financial solutions, then e-mail resume to Melissa Scoggins at scoggins@2rsi.com or mail to 5857 Owens Avenue, Suite 110, Carlsbad, CA 92008.