Retirement Solutions, Inc. – *Wealth Advisor*   Carlsbad, CA

Local financial planning firm is seeking a Wealth Advisor to assist in managing the firm's less complicated clients. This advisor's primary duty will be to service the firm's small to mid-size accounts. The Wealth Advisor is also responsible for advising clients on financial related issues, developing recommendations for asset management and assisting in the active management of clients' marketable securities portfolios, financial planning responsibility for the firm's small to mid-size clients. The ideal candidate is able to build an excellent business for himself or herself while allowing the Senior Wealth Advisor to focus on the more complex client situations.

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 support the advisor in the prospecting process and then provide proactive, high touch service to existing clients.

The position requires an ability to provide high touch, professional service to high net worth clients. It is mandatory for this person to have excellent interpersonal and organizational skills, a client service attitude, and a burning desire to succeed. The qualified applicant must have expertise with financial planning software. Applicants must have FINRA Series 7, 63, and 65 with CFP® certification.

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 forming great relationships with clients, providing great service, and offering professional solutions, then e-mail resume to Melissa Scoggins at scoggins@2rsi.com or mail to 5857 Owens Avenue, Suite 110, Carlsbad, CA 92008.