



GV Financial ADVISORS

Associate Advisor

Company Information

GV Financial Advisors is an Atlanta-based, privately-owned company that offers Guided Wealth Transformation™ to successful families. We seek to help our clients recognize their true desires and motivations in terms of lifestyle, retirement, and legacy and then to develop realistic plans for realization of their goals. Bringing clarity to what our clients really desire, we are able to join together all of the different elements of financial planning into a comprehensive game plan devoted to achieving those ambitions.

There are four core values that serve as the guiding principles for everything that we say and do, both with our clients and our team members:

- ***We do what is right.*** We are guided at all times by the principles of ethics and integrity. We are honest not simply because it is good for business, but because it is the right thing to do.
- ***We do what is in our clients' best interest.*** We serve as advocates for our clients. No one outside of family members will care more about our clients' financial futures than GV Financial Advisors.
- ***We strive to be more than fair.*** We set and maintain the highest standards in our relationships with our clients, other professionals, and our employees.
- ***We take responsibility for all we say and do.*** Our clients place enormous trust in us and in our recommendations. We take that responsibility to heart and accept full responsibility for our actions and recommendations. Our job is to deliver the advice and services our clients expect and deserve. We know we only win when our clients win.

Position Information

Associate Advisors enter a comprehensive training program that includes fundamental and advanced technical instruction. They will also receive real time training through working directly with senior advisors who have eight plus years experience in the field.

Responsibilities:

- Analyze clients' business and financial objectives
- Coordinate with Senior Advisors, the Planning Department and Investment Department to create financial plans and investment proposals
- Manage implementation of complex financial plans, including interaction with accountants and attorneys
- Retain existing clientele over the long-term

This is not a sales position, though it involves extensive client contact through joint work with senior advisors and requires preparation of unbiased needs-based product research when applicable. If candidate shows the ability to sell and maintain relationships on their own, promotion to senior advisor is possible after a minimum of three years.

Requirements:

- Ambitious, service-oriented professional who is comfortable in a highly autonomous environment
- A college degree and two to five years financial planning experience is required
- Candidate must be securities and insurance licensed
- Applicant must possess a proven intent to pursue a career in financial planning
- Excellent written and verbal communication skills
- Superior analytical abilities and strong work ethic

It is essential that candidates find it rewarding to help others achieve their financial goals and align with our financial planning and client service philosophy. The Associate Advisor must be comfortable interacting with and maintaining relationships with high net worth clients.

Compensation:

- Salary commensurate with experience, plus potential bonus
- Attractive employee benefits program including health, dental and disability insurance and profit sharing/401(k)

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