Wealth Advisor

As a primary Fiduciary, Petersen Hastings serves committed investors with complex financial needs. Our multigenerational team of experienced and credentialed professionals delivers innovative solutions to enhance and preserve wealth.

Overview

Wealth Advisors understand client relationships, build The Trusted Path and The Retirement Path advocates, and cultivate strong service line equity through superior client service. They are part of an internal group of professionals with broad financial backgrounds focusing on money management and consulting. The Wealth Advisor works with centers of influence and the other Wealth Advisor to develop and execute growth programs for Petersen Hastings.

Purpose

The Wealth Advisor presents a vision for our client's needs, defines and manages the client's expectations, provides consistent and high-quality service, while cultivating additional assets through asset consolidation and referrals.

Essential Duties and Responsibilities

- **Relationship Development**
  - Primary point of contact for a pre-defined segment of the firm's client base either working with a more experienced Wealth Advisor or on your own - both individually and collaboratively
  - Develop and foster positive relationships with internal and external expert team members
- **Customer Service**
  - Professionally and courteously handle investor inquiries and requests to ensure that a high level of satisfaction is achieved through constant and consistent attention to Petersen Hastings Vision, Mission, and Values
  - Formulate and implement advice but may also rely on technical specialists to develop recommendations within an individual specialist's area of expertise
  - Participate in the portfolio review/monitoring process and work in collaboration with investment team to manage cash flow, tax issues, etc. associated with client portfolio
  - Accountable for the management of your client's investment portfolios to ensure that Petersen Hastings services to qualified investors are effectively and efficiently administered and managed to established standards
  - Provide clients with financial information, reports, and documents, as required/requested
  - Maintain client relationship management database
- **Business Development**
  - Identify, cultivate, and track new opportunities by visiting with existing and potential new clients, community involvement and professional networking

Prerequisites

Education and Experience

- Bachelor's degree in accounting, finance, economics, mathematics or other business-related areas
- Series 65 license
- Certified Financial Planner™ (CFP) designee or candidate

Skills and Knowledge

- Experience, judgment and acumen in financial planning and wealth management
- Proven ability to view financial planning holistically and incorporate the various planning disciplines (retirement, tax, estate, insurance, education, philanthropic, etc.) into client communication
- Sales-oriented, self-motivated/managed, disciplined, responsible, and empathetic
- Talent for networking and strong determination to succeed
- Enjoy the challenges of seeking out new clients through associations in the community and referrals from previously satisfied clients
- Ability to build partnerships with other expert team partners (CPA, insurance, attorney)
- Extremely client-centric

Personal and Interpersonal

- Committed to strong values and upholding the highest ethical behavior
- Adhere to strict standard for confidentiality and discretion of all client information
- Ability to project a professional image of her/himself and Petersen Hastings to clients, prospects, and other third parties; self-assured, outgoing and confident
- Work well under pressure and willing to contribute to the wider strategic picture
- Capable of developing partnerships with internal departments and external organizations with clarity, flexibility, and sensitivity
- Collaborative, able to work with and through others

About Petersen Hastings

Petersen Hastings originated in 1962 as a property and casualty company with the promise that the client's interest would be first. Over the next 30 years the company evolved its services to include retirement plan administration, investment management and personal financial planning. Petersen Hastings continued with the promise of client's interest first with an early adoption of an independent fee only structure and always acting as primary fiduciary. Petersen Hastings provides each and every client with a team experience through The Trusted Path. Petersen Hastings has continued its path of growth in employees, clients, and geographic span to be nationally recognized and one of the largest independent Registered Investment Advisors in the Pacific Northwest. For more information about Petersen Hastings, please visit us at: www.PetersenHastings.com.

Additional Information

Primary Location	Kennewick, WA
Schedule	Full-time
Experience	Mid-Senior level
Functions	Relationship Manager, Financial Consulting
Travel	Educational and/or alliance partner project purposes

If you find that you have the above characteristics we invite you to discuss being a part of our PH team. To apply, submit your cover letter and resume at LynnR@petersenhastings.com. Petersen Hastings is an equal opportunity employer.