

Wealth Management Advisor

Symphonic Financial Advisors - Madison, Wisconsin Area

Come join our family!

Symphonic Financial Advisors is looking for an experienced advisor to join our team of professionals. The responsibilities include new client acquisition, service and retention of client base, financial planning, fee-based investment management services and risk (insurance) strategies. The right person will have an opportunity to work closely with a senior CFP in Madison, WI in an existing office. We offer competitive payouts and a cooperative culture to help you grow your investment practice. Our advisors have access to sophisticated and professional money management teams, relevant economic information and education, portfolio diagnostic tools and key information for the development of client risk and return budgets.

Are you the right person?

Ideal candidates must have FINRA licenses (Series 7, 66), State Life and Health licenses, a clean CRD, and have a proven track record of experience in working with individuals, families and businesses. Personality, ambition, compassion, ethics and technology experience is a must. Also, a minimum of 3-5 years experience in financial planning, fee-based investments and/or insurance placement will further qualify you for partnering with Symphonic as a registered representative.

Why choose us?

Symphonic Financial Advisors is a full service Broker Dealer committed to providing independent-minded advisors and CPAs the latest technology, education, investment intelligence, sales strategies and interpersonal skills development necessary to build and maintain a profitable financial services practice. The investment and insurance platform includes a fee-based mutual fund asset allocation platform, access to third-party managers, and relationships with a Senior Investment Consultant to assist in winning HNW client accounts. Brand yourself as a trusted and credible advisor guided by integrity and ethics through partnering with a firm built on fiduciary standards of excellence.

Let's Talk!

Please submit a resume to shelly.hall@symphonicfa.com. Visit our website (currently under improvement), www.symphonicfinancial.com/careers.

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