

# Financial Advisor

Apply online at [tcunet.com](http://tcunet.com)  
St. John, Indiana

## **Essential Function**

Assists members in determining their financial goals and objectives, developing a financial plan and implementing the plan by selling appropriate financial products.

## **Responsibilities & Duties**

1. Meets with members to discuss their financial situation, completes a financial analysis and makes recommendations of financial products to help members to attain their goals.
2. Assists members in choosing appropriate amounts and types of life, disability, health insurance and investments.
3. Participates in marketing activities to increase awareness of TCU Investment Services including seminars, lobby days, business development, member referrals and telemarketing.
4. Completes production and traffic reports accurately and on a timely basis.
5. Assumes additional duties and responsibilities necessary for the growth and smooth operation of TCU Investment Services.
6. Limited travel and some evening hours are required.

## **Specific Skills**

- Outstanding sales skills
- Clear written and verbal communication skills
- Computer literacy in a Microsoft Windows environment
- Effective human relations skills and the ability to communicate financial information to people with varying experience

## **Accountability**

- Accountable to make solid financial recommendations to members, provide quality member service, present a professional image and meet productivity requirements to ensure growth and profitability of TCU Investment Services.
- Meet sales goals set annually.
- Accountable for understanding and applying government laws and regulations and TCU policies and procedures relating to the Anti-Money Laundering Regulations including but not limited to the Bank Secrecy Act (BSA), US PATRIOT ACT and OFAC.

## **Minimum Requirement**

- Bachelor degree in Financial Planning, Finance or Economics or equivalent work experience.
- Life and Health Insurance licensing
- Series 6 & 63 Securities licensing in Indiana
- CFP and Series 7 preferred (Series 7 must be acquired within first three months of hire) 1 year working experience in financial services

## Exempt

Our company provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability or genetics.

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