



Position: Financial Advisor

Full-Time, Salaried Position

Location: In-Person and Remote Flex

EViE Financial Group is an independent, values-based financial services firm located in Upper Marlboro, Maryland. While serving clients throughout the Maryland, DC, and Virginia regions predominantly, EViE advisors also assist and guide clients across the country with their financial planning and wealth management needs. EViE Financial advisors work as a connected but diverse team, and we focus first on serving clients with care, attention, and inclusivity. We have an education-first approach to both financial planning and wealth management, and our advisors work to deliver that with each interaction with clients and team members. To this end, we are seeking a full-time Financial Advisor to join the team.

This is an opportunity to play a key role in a small, growing financial services firm where your potential to excel is unlimited. Because we are a small team, opportunities exist for diverse assignments and advancement in different directions. Our interest is in helping you find the right long-term fit in our firm as it grows, and to maximize your potential while meeting the needs of EViE Financial and its advisors.

Description:

We're looking for a fun, professional, and thoughtful person to join our team as financial advisor. This position supports the EViE Financial Advisor team to ensure that clients receive courteous, prompt and efficient service for their financial planning, wealth management, and insurance needs. The role of Financial Advisor includes a variety of client-facing and internal tasks, so the individual filling this position must have the ability to communicate both professionally and accurately with clients and business partners, as well as with the team. The person in this role will have the opportunity to receive training and professional development to grow as a financial professional.

The Financial Advisor position requires strong skills in data gathering and analysis, as well as excellent personal service to clients. Attention to detail, capacity to manage and prioritize many complex tasks, a friendly style, welcoming personality, and strong work habits are necessary to succeed in this role. We are looking for an individual with a healthy desire to grow in their career, and the patience to grow with EViE Financial values in mind.

Job Requirements:

- The ability and willingness to work in the office full time initially (flexible remote work may be offered after successfully working in the office for some time)
- Strong communication skills, both written and verbal
- Strong organization skills and ability to multitask

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- Working knowledge of Zoom, Microsoft applications, and Google Docs
- Experience with CRM software for data management
- Working knowledge of financial planning software and investment management tools
- Maintain necessary licensing and continuing education requirements
- Work collaboratively with the team through workflows and project management
- Ability to successfully prioritize tasks and requests, and to manage follow-ups and reminders in a prompt and friendly manner
- A growth mindset and ability to handle changes to internal or external tools
- Participation in marketing and community events
- Management of lead flows and opportunity tracking

Additional Skills/Attributes Required:

- Bachelor's Degree or higher
- Desire to grow professionally in a financial services firm
- Previous financial planning or wealth management experience
- Current Series 65/66 license (or equivalent)
- Current financial services designation or ability to earn (CFP, CFA, CSRIC etc.)
- Strong cognitive abilities and desire to problem solve and implement solutions for clients and the team

In exchange for your time, energy, commitment, and experience, we offer a starting salary of \$65,000, profit-sharing bonus, retirement plan with matching, health insurance reimbursement, and a great working environment in a professional office near Largo Town Center. Team members who demonstrate mastery of their tasks have the option of hybrid remote work arrangements after a period of time.

Anyone who joins our team should align with the values we have set out as a firm: Education first, Vitality in clients' financial lives, Independence in the approaches we take to serving clients, and Empowerment in delivering the services we offer. Additionally, the tenets of diversity, equity, and inclusion (DEI) are of utmost importance to us as a firm. EViE team members believe that everyone is welcome at the table, and we strive to promote inclusivity not only internally but externally when working with the community, colleagues, and clients.

EViE Financial Group is an equal opportunity employer and all qualified applicants will receive consideration for employment without regard to race, color, religion, gender, sexual orientation, national origin, disability status, protected veteran status, or any other characteristic protected by law. To apply, send resume and cover letter to melissa@eviefinancial.com. No calls will be fielded for initial inquiries into this position, but email will be checked and responded to promptly.

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