Established, rapidly growing RIA fee-only firm in Bellevue, WA seeks financial advisor to help nurture prospective clients generated by the firm and provide unsurpassed service to existing clients of Mainsail Financial Group. We focus on being a guiding force for change in our industry and empowering our community to make educated financial decisions. Mainsail is a fast-growing firm established in 2019. As of 2024, we have grown over 10 times with a similar trajectory ahead.

We invest heavily in our team and provide a unique opportunity. Mainsail Financial Group offers a place to flourish, push yourself, grow, and make an impact. We strive every day to foster a firm of excellence and are looking for team members who possess the following qualities:

- An **enthusiastic** contributor who aims to make the most of each day
- **Self-disciplined** to consistently make an impact and wants to build something special
- A **collaborative**, goal-oriented team member
- A strong desire to **empower** and educate prospect and client relationships
- **Relentless** in their pursuit of personal and professional growth

Recruiting for this role ends on August 16th at 11:59 pm PST.

Our ideal candidate:

Given our path ahead, an ideal candidate would be someone that is excited for the opportunity to join an established firm with a bright future and the opportunity to grow together with no limits to your career development potential. We are looking for an advisor with a planning-first mentality, providing a high level of client service for pre-retirees and retirees that focuses on tax, distribution, and estate planning. We have developed a marketing system that provides new client opportunities, driving more leads than our team's current capacity. As a result, we are looking for someone who can hit the ground running to service our existing clients and take on new client opportunities.

Work You will Do:

As an advisor with Mainsail, your time would be spent primarily on financial planning for existing and prospective clients. We provide resources for investment management, paraplanning, data input, and administrative assistance. Our goal is to enable you to spend more time doing what you are best at: making recommendations and building client relationships.

Advising and managing client relationships:

- Develop and deepen client relationships
- Help individuals identify their unique financial needs and objectives
- Develop, present, and monitor personalized financial planning recommendations
- Monitor financial planning recommendations
- Provide excellent client service
- Remain up to date on industry developments, service and product enhancements, regulatory issues, etc.

Business development for acquiring new clients:

- Reach out to opportunities provided by the firm
- Run new client meetings and follow firm processes for new client onboarding
- Gather data, including goals, and work with our paraplanner to analyze and evaluate financial status
- Implement personalized financial planning recommendations
- Track and manage new business pipeline to follow up and track potential new clients

Qualifications:

- Minimum 3 years in financial services
- Series 65 licensed or Series 66 and 7
- Advanced degree/designation is a plus (e.g. MBA, CFP®, CPA, etc.)

Benefits and Compensation:

- Paid time off
- Medical and dental insurance
- Health insurance