

Position Profile

Title: ***Investor Relations/Financial Service Professional***

Location: Wenatchee, WA (Employer will pay relocation)

Reports To: Managing Principal

Organization: Wealth Management Organization

Description: Private capital equity firm. Partners with over 30 years of experience. Steady growth. Multi-million dollar company that invests in income-producing real estate opportunities to help diversify wealth and increase portfolios, throughout the Pacific Northwest. Commercial Real Estate backed by property title of ownership, allowing individuals or businesses to invest in a truly diversified portfolio.

Position Purpose & Responsibilities:

- Agreed upon goals of multimillion growth
- Life and Health Applicable to enhance income
- Educational Seminars and Investor Presentations
- Model the Corporate Values

Skills & Qualifications:

- 3 to 5 yrs. experience working with SEC/Finra regulations
- Knowledge of DST, 721 Exchange, 1031 Exchange, etc.
- Completed Securities Industry Essentials (SIE) exam
- Series 65 or 7 license or willing to acquire license
- Preferably have own Book of Business
- Mortgage experience also a plus
- Must have a Washington State Insurance License or willing to get one
- Excellent oral and written skills
- Proficient in MS Office including Excel, Word, Outlook, PowerPoint, as well as cloud-based service systems
- Proficient in Adobe, Mail, Calendar, and One Drive
- Office and Administrative assistance and Research and leads generated

Training in:

- Client and prospecting system
- Track and implement client service work
- Strategize and plan client meetings
- Educate prospective and current clients
- Participate in on-going staff training as required and/or needed

- Identify risk management strategies
- Provide intermediary services between client and insurance companies
- Research products
- Manage clients to review and update their investments

Compensation:

DOE \$100,000 first year salary. After 1st year Commission based

No cap potential on compensation

For consideration and additional information please contact:

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