

Position Overview

The Advisor Experience Associate will partner with multiple groups within tru Independence (tru) to grow and enhance the overall advisor experience. This individual will assist in cultivating new and deepening existing relationships with advisors reporting directly to the President and Chief Operating Office at tru. He/She will initiate sales calls, respond to inquiries in a timely manner, assist in the launch of new products/services and manage the business development process. This will be a hybrid office/remote position located in greater Philadelphia region.

Responsibilities

- Develop an in-depth knowledge of the tru Independence platform and grow and manage a consistent and continuous new business pipeline through relationship building prospecting tools and research.
- Work closely with the Advisor Experience team to further existing advisors understanding of the tru Independence platform and increase adoption and utilization across technology, marketing and investment services.
- Proactively support team initiatives and complete special projects and other duties as assigned
- Work closely with the operations team to resolve any client issues
- Work with contact relationship management database (Hubspot) to track meetings, and maintain detailed files and communication records for each advisor
- Manage tru Experience days: information sessions for new potential advisors
- Work with the CFO to create business proposals and pro-forma models as part of the business development process

Basic Qualifications

- Bachelor's degree
- 5 years' experience in the financial services industry in a sales environment
- Demonstrable experience in outbound calling
- Ability to understand and create financial models
- Can demonstrate investment product and financial services technology knowledge
- Ability to travel 10-20% of the time
- Series 7 and 63 FINRA licenses preferred but not required

Preferred Qualifications

- Strong desire to succeed, self-starter with energy, enthusiasm, and desire necessary to achieve goals in a consistent and timely manner
- Ability to work in a fast-paced team environment
- Excellent verbal and written communication skills
- Excellent organizational and prioritization skills
- Strong understanding of financial markets