Position Description

Experienced investment professional responsible for delivering the Bigelow investment and financial planning experience to clients and prospective clients, serve as trusted advisor, providing actionable advice, guidance and reporting on investment results and financial goals.

Title: Wealth/Investment Advisor

Reports to: Managing Partners

Status: Full-Time with Benefits

Summary

Bigelow Investment Advisors ("Bigelow") is a Portland, Maine based wealth management firm serving individuals and institutions. Bigelow, a registered investment advisor with the SEC, manages over $400 million in assets. Bigelow utilizes a goals-based financial planning and investment management approach. Bigelow's advisors support and serve clients by providing investment management and financial planning advice and services. Bigelow seeks an experienced wealth/investment advisor to help contribute to Bigelow's next growth phase.

Duties and Responsibilities

Responsible for delivering the Bigelow investment and financial planning experience to clients, providing actionable advice, and reporting on investment results and financial goals.

Responsible for meeting with and onboarding prospective clients through a consultative sales process.

Ensures accounts managed in accordance with investment objectives that have been developed with the client, supported by Investment Committee and Bigelow's Chief Investment Officer.

Communicates and supports implementation of Bigelow's investing philosophy and portfolio management strategies.

Prepare and present market and/or portfolio updates to clients.

Develops and presents customized and comprehensive personal financial plans.

Meets regularly with clients regarding financial matters important to them and changes in their financial circumstances.

Supports clients financial planning needs collaborating with client's estate planning and tax advisors.

Works closely with Bigelow client services coordinators to implement the Bigelow client experience.

Supports Bigelow's business development goals.

Values team based service model and contributions from all Bigelow professionals.

Qualifications

- Work experience: At least 3 years in a financial or investment advisory role.
- Education: College graduate, minimum of undergraduate degree.
- Professional designations/certifications: CFA or CFP designation preferred.
- Desired Technological proficiency: Tamarac Reporting, Tamarac CRM, Tamarac Trading, Money Guide Pro/financial planning platforms, Microsoft® Office, Schwab/custodial trading platforms and other office programs and equipment.

Compliance and Regulatory

- The wealth/investment advisor position requires individuals to take and pass state adviser and securities examinations (the Series 65 or the SIE, Series 7 and Series 66 examinations). Certain professional certifications and designations (e.g., CFP, CFA, and others) shall waive the exam requirements but must meet all other requirements.
- The position also requires adhering to all company compliance standards and expectations.

Competencies

Emotional Intelligence – Knowledge and ability to perceive, control, and evaluate their and others' emotions and use these cues to guide thinking and behavior.

Client Relationship Management – Knowledge and ability to determine and satisfy client needs and maintain a trusted relationship.

Investment and Portfolio Management – Knowledge of and ability to utilize the tools and best practices to implement investment strategies based on investment objectives and client's goals and needs.

Financial Planning – Knowledge of and ability to utilize the tools and best practices associated with creating and maintaining a client's financial plan.

Decision Making and Critical Thinking – Understanding of the issues related to decision-making and ability to analyze and weigh factors accurately and insightfully.

Effective Communications – Understanding of effective communication concepts and tools and ability to effectively share, interpret and receive information.

Salary and Benefits

- Salary will be based on experience
- Bonus
- Benefits (medical insurance, dental, short and long-term disability, life, vacation, volunteer time, sick and family leave, 401k match)
- Remote (expect in-office days initially in Portland Maine office, and in-office/remote thereafter)

Application Process

Please email your resume and cover letter to Michael Moore at mmoore@bigelowadvisors.com. We are unable to respond to all inquiries. Please do not call or email for status updates. After screening all inquiries, we will contact selected candidates for further discussions. Thank you.

https://www.bigelowadvisors.com/careers/