

## **Relationship Manager/Associate Financial Advisor**

**Toler Financial Group** (TFG) is headquartered in Silver Spring, MD, and we serve clients in the Washington DC metro area and across the nation. We specialize in working with progressively-minded clients who are seeking holistic financial planning and socially responsible investments. We put our clients first in everything we do, and are careful to guard our strong reputation.

We are seeking a motivated and energetic professional to assume the role of Relationship Manager/Associate Financial Advisor in our Silver Spring office. We strive for an employee culture of one unified team, contributing to the value and success of our organization and to the financial success of our clients. Firm partnership opportunities are available in the future for partner-level contributions.

### **Summary**

The Relationship Manager/Associate Financial Advisor will be on a track for a permanent career position. Experience is helpful, but not necessary - strong aptitude and motivation are the most important. They will be working towards a leadership role on our team, providing financial planning and relationship management to the firm's clients, plus growing the firm's client base. Investment analysis, portfolio management and planning systems are all part of the job as we grow into a larger team.

### **Responsibilities**

- Full team member with shared responsibility for smooth and profitable operations
- Attend all client meetings and be responsible for all follow-up activities
- Client communication systems and tracking
- Build and maintain a relationship with the client base
- Assist in developing client materials and programs
- Interact with the firm's operations team on all planning and follow up
- Develop and maintain written systems of all activities
- Pursue and maintain all licensing and continuing education requirements
- Attend all firm client events, assist in planning prospecting events
- Prospecting and business development to build our client base

### **Knowledge, Skills & Abilities**

- Excellent interpersonal and communication skills
- Excellent attitude and an extraordinary client service orientation
- A genuine interest in serving and caring for other people
- Excellent organizational and time management skills
- A burning desire to succeed with complete integrity
- Ability to handle multiple tasks and demands with humor and confidence
- Health & Life Insurance License, FINRA Series 7, 63/65/66 (or ability to complete in first 12 months)
- Clean U-4 and U-5 history (or completely clean background check)
- Bachelor's degree or higher required

## Helpful

- Masters in Business or Financial Services
- Previous sales or client service experience
- CFP®
- 3 plus years of investment advisory and/or financial planning experience

## Benefits

In exchange for your time, energy and expertise, we offer a base salary (commensurate with education and experience), bonus potential, Simple IRA with matching, and a great working environment in a professional office location near the Silver Spring metro. This is an opportunity to play a key role in a small, rapidly growing company where your potential to excel is unlimited. (If you bring a book of clients with you, we will work out a fair compensation package that takes that into account).

TFG 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. We are a very LGBT-friendly office, and our whole team must be very comfortable working with our diverse clientele.

## To respond to this opportunity, please

1. Send a cover letter and resume to: [ftoler@tolerfinancialgroup.com](mailto:ftoler@tolerfinancialgroup.com)
2. Complete our position assessment tool  
<https://hiring.wonderlic.com/openings/5a4429dec44d3300017f9048/apply>

We will contact you for next steps.