

Wealth Advisor - Full Time, Middleton, WI

T. Anton Investment House, Inc. is growing! If you are a self-motivated person who wants to help others become financially independent and you desire to work in a friendly boutique firm that's completely independent, we would love to talk with you.

T. Anton Investment House, Inc. is a fee only registered investment management and financial planning company. Our goal for our clients is for them to understand their money, their portfolio and to realize their dreams. We help create a roadmap to retirement that incorporates our clients' risk tolerance, timeline and lifestyle. We work on behalf of our clients as a fiduciary and use no proprietary products.

Job Responsibilities:

- Employ financial planning strategies in all areas including tax, retirement, investments, insurance, college planning and estate planning.
- Develop, present and record financial planning, investment reports and investment advisory recommendations to individuals and families.
- Maintain ongoing client relations by taking lead role in communications ensuring timely responses and integrity in all actions.
- Document client information in Customer Relationship Manager (CRM) as well as maintain a "to do" list.
- Must be self-motivated individual who desires to work in a team environment.
- Must be able to work on a team to monitor portfolios and implement investment and financial planning changes as needed.
- Develop new business by participating in community events, organizations, networking, as well as develop and deliver seminars and make speaking appearances.
- Work to continually improve company investment and financial planning processes.
- Support primary advisor and other advisors.
- Perform administrative and operational tasks so organizational needs are met.

Qualifications:

*Bachelor Degree in Finance or related field.

* Certified Financial Planner or willing to take and pass the exam within 12 months of hire.

* Five+ years of experience in financial services is required.

* Computer efficiency Microsoft applications

Please send resume, three references and cover letter expressing your qualifications, interest and salary requirements to:

Tracey Anton, President

tracey@tantoninvestmenthouse.com