SCHECHTERWEALTH
Join The Team

SCHECHTER WEALTH 2015 Winner of "101 Best and Brightest Companies"

Join our team of multi-disciplined professionals who help clients preserve, leverage and transfer their wealth. Recently named one of the top 101 Best & Brightest companies to work for in Metro Detroit and the Nation…our core values create an incredible working environment that allows us to really live and deliver on those values.

OUR CORE VALUES

Clients Needs First! • Create a complete "WOW" experience for clients and our staff!
A Special Place To Be! • Cutting Edge Knowledge – we strive to be the experts.

INVESTMENT SOLUTIONS ANALYST

DESCRIPTION

We are seeking an organized, detail-oriented team player to contribute to the growth and profitability of our company. The Investment Solutions Analyst ("ISA") plays a vital role on the Wealth team, contributing directly to our premier client service strategy. ISA's apply their analytical skills, financial acumen, and an understanding of our methodology to the creation of client-ready proposals, financial planning analyses and recommendations. ISA's strive to be the experts through a proactive approach to the financial marketplace, and they understand the "why's" and "how's" of our products. In addition to working closely with our Advisors, ISA's frequently collaborate with colleagues in all other departments, including Investment Advisory, Client Service, and Underwriting, all in an effort to deliver a complete "Wow" experience to clients.

ESSENTIAL JOB FUNCTIONS

- Utilize investment analysis software to determine the most efficient strategies and financial products for clients based on their individual investment objectives and Advisor recommendations.
- Analyze investment/retirement plan options for current and prospective clients, putting the clients' needs first.
- Design, engineer, and create detailed client deliverables in various mediums: Word, Excel, PowerPoint, Prezi, etc.
- Build effective relationships through interactions with Advisors, Analysts, and Vendors.
- Contribute to our premier client service strategy through creative thinking about how to convey key messages to clients about markets and products.
- Identify common themes across our client deliverables; work to continuously improve our external and internal reports, methodologies, and processes.
- Prepare and update client information for annual reviews.
- Engage in various data entry tasks as necessary.

This is an ideal opportunity for a college graduate with a business background to start at the ground floor of a growing financial services company. Our company offers significant opportunity for career growth and advancement.

EXPERIENCE

- Education: Bachelor's degree required, preferably in business related field
- Experience: Recent graduate— 2 years of experience preferred in retirement or financial planning field (this could be internship experience)

REQUIRED SKILLS

- Strong computer skills, particularly with Microsoft Excel and Microsoft Word
- Exceptional verbal and written communication skills -Bachelor's in Business Administration
- Strong intellectual curiosity to understand complex financial products and legal concepts
- Enthusiasm – the company's culture is based on meeting our client's needs and exceeding their expectations
- Strong written and verbal communication skills; a persuasive and passionate communicator with excellent public speaking skills
- Microsoft Office general knowledge for: Word, Excel and Outlook

METROPOLITAN DETROIT'S 101 BEST AND BRIGHTEST COMPANIES TO WORK FOR WINNER 2015

Please send your resume & cover letter to Joe Opiela, Schechter Wealth Team Manager & MSU Alumnus
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INVESTMENT ADVISORY & ADVANCED LIFE INSURANCE DESIGN

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