



Join our Team!

Join our team of multi-disciplined professionals who help clients preserve, leverage and transfer their wealth. Recently named one of Crain's Cool Places to Work for in Metro Detroit...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.

[Click here to view the video](#)

SCHECHTER WEALTH ADVISOR

DESCRIPTION

Advisors are responsible for converting prospects in to clients and ultimately in to raving fans, and for meeting revenue and business development goals. Individuals in this role should cherish and feel challenged by developing new relationships, building confidence and trust in those relationships, assessing their needs and challenges, and presenting unique, client focused solutions that meet their needs. Key service offerings for individuals include investment portfolio review, estate planning strategies, asset management, and life insurance design. Offerings for businesses include succession planning, group benefits and retirement programs.

EXPERIENCE

Extensive personal and professional relationships with high net worth individuals and families. Demonstrated ability to build relationships with high net worth individuals and their professional advisors. 15+ years of related business experience.

Experience with...

- Developing and closing business with individuals
- Assets Under Management: managing investible assets for clients; and/or
- Estate Planning: developing strategies to protect, grow and transfer wealth; and/or
- Life Insurance: designing and presenting advanced life insurance solutions

REQUIRED SKILLS

- Self-Motivated
- Prospecting Skills
- Meeting / exceeding sales goals
- Ability to "soft sell"
- Client relationships / people skills
- General math skills
- Organization
- 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

PREFERRED, BUT NOT REQUIRED SKILLS

- Bachelor's or advanced degree in business
- Accounting or legal experience
- Securities license(s)

Please send your resume to careers@schechterwealth.com