



SCHECHTERWEALTH

KNOWLEDGE CREATES OPPORTUNITYSM

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.

ADVISOR / WEALTH ADVISOR

DESCRIPTION

- Generates new business by contacting potential customers (both existing and new) and assessing the needs for: Wealth Transfer, Wealth Accumulation, Retirement Planning, Business Succession Planning, Executive Benefits and Charitable Planning.
- Has the ability to offer a variety of services based on a client's needs and helps clients choose the plans that best suit their needs. The services include life insurance, asset management, investment portfolio review, estate planning strategies, 401k plans, disability insurance, group benefits for businesses, and succession planning for businesses.

EXPERIENCE

- Extensive existing relationships, both personal and professional, with high net worth individuals, families, and businesses; CPA's and attorneys who advise high net worth clients; and, charities.
- Business development experience or experience selling and closing
- Experience in any of the following areas—designing and selling insurance products as an investment, estate planning strategies, or gathering assets under management
- 15+ years of related business experience

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



INVESTMENT ADVISORSORY & ADVANCED LIFE INSURANCE DESIGN

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