

## Advisor

### **Providing exceptional service to our clients starts with investing in exceptional people!**

We are an independent wealth management firm committed to providing "Advice at a Higher Level" to our clients. A contributing factor to our success is our unique team structure. How do we build a successful team? We foster a culture of professional development, collaboration, and respect. We are passionate about what we do. We have fun, we work hard, and we are nice to each other. A successful team takes care of each other. This translates to a highly competitive Total Rewards package, including a generous benefits package and a paid time off policy that reflects our commitment to a healthy work-life balance.

### **The Advisor Role**

The Advisor role works under the guidance of Lead Advisors to strategically manage private client relationships utilizing Cable Hill's service deliverables. This position will either perform or delegate certain operational tasks for assigned clients. This is a salaried, exempt position.

### **Duties & Responsibilities**

- Manage, support and coordinate private client relationships. Engage in regular client interaction, including telephone and email communications.
- Collaborate closely with Lead Advisors at all stages of the client review meeting process, including preparation of materials and attendance at the meetings. Ensure accurate and detailed notes are entered into the CRM following the meeting. Follow up on action items.
- Under the guidance of CHP's Lead Advisors, act as a lead for private clients as assigned. Develop a thorough understanding of each client's financial situation in order to create and deliver a suitable and holistic financial strategy for the client's goals.
- May execute client trades and perform tasks associated with client's cash flow and money movement directives.
- May work independently or on a team to manage firm level projects as needed.
- May oversee the documentation related to client onboarding and ongoing maintenance including account applications, transfer documents and other forms as required.
- May perform calendaring functions with both internal teams and external clients, prospects and COIs.
- Ensure accuracy and integrity of client records, centers of influence ("COI"), and prospective clients.

- Work with team members to ensure training and reference documents are accurate and updated as needed. Monitor industry trends and alerts and disseminates pertinent information as needed.
- May engage in business development activities including developing and expanding relationships with COIs and generating referrals from existing clients.

### **Professional Qualifications**

- A minimum of 5 years of experience in a client-facing role in the financial services industry.
- Current Series 65 or 66 license. CFP designation or willingness and ability to work towards a CFP designation concurrently with performing the duties of this position.
- Bachelor's degree required.
- Proficiency in Microsoft Office products required.
- Experience with Salesforce preferred, but not required.

### **Skills & Attributes**

**Teamwork** – Highly collaborative and dedicated to continuous perfection of CHP's ability to deliver superior customer service to its clients.

**Integrity** – Exhibits a high level of integrity through interactions with internal and external customers. Goes above and beyond to do what is right for team members and clients.

**Customer Service** – Exceptional internal and external customer service skills. Ensures positive interactions through active listening and professional feedback.

**Communication** – Excellent oral and written communication skills. Projects a professional, capable image in both action and appearance.

**Leadership** – Provides leadership through modeling a vision of excellence in the client experience. This vision is shared through coaching in a manner that provides a positive learning culture for client-facing staff members.

**Adaptability** – Remains professional when working with multiple personalities. Flexible with changing priorities, and successfully works with minimal supervision in a fast-paced environment.

**Capacity** – Strong time management skills, with an ability to effectively organize and prioritize tasks. Manages heavy, time-sensitive workloads, while maintaining accuracy through a strong attention to detail.

**Judgment** – Skilled problem-solving, particularly for obstacles in which the next course of action is unclear. Without hesitation, seeks guidance and direction when unsure of how to proceed.

***We strongly urge people from unrepresented groups to apply.***

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