FINANCAIL REPRESENTATIVE/ADVISOR

- Is an established market, where you know who your prospects and clients are important to you?
- Are you tired of cold calling?
- Do you value your independence?
- Do you want the freedom to sell your choice of products?
- Do you want to be financially rewarded for hard work?
- Do you have the desire to make a positive impact in people's lives every day?

Our representatives are entrepreneurial, independent business owners who have the support of one of the largest Broker/Dealers in the 403(b) marketplace and the choice of using over 1,700 mutual funds and annuities. In addition, Creating & Managing Wealth offers a complete range of asset management programs, stocks and bonds, life insurance, disability and long-term care insurance.

Financial Representatives with Creating & Managing Wealth provide professional guidance and innovative solutions for the retirement planning needs of teachers and other non-profit employees.

Creating & Managing Wealth Financial Representative Responsibilities:

- Prospects for new clients (phone, in-person, group meetings, workshops, etc.)
- Public speaking (presentations)
- Enrolls (sells) new clients (one-on-one, in-person)
- Conducts existing client account reviews
- Analyzes investment performance data
- Prepares for future sales/enrollment presentations
- Develops, presents and helps implement financial plans
- Analyzes prospect suitability and investment objectives/needs
- Presents financial solutions (retirement, insurance, college planning, and investment)

Much of what our financial reps do is done on site at an employer's (school district, college, etc.) location. You will probably spend approximately 80% of your time out of the office.

Creating & Managing Wealth financial representatives address the needs of nearly 100,000 clients who have invested in excess of $7 billion in mutual funds, variable annuities, stocks and bonds.

Requirements Financial Sales Representative:

- Established business/territories
- Track record of successful work experience for a period of three to five years.
- Ability to acquire Series 7 or 6 and 66 registrations, and additional licensing needed to assist in building a career as a Financial Advisor.
- Ability to communicate effectively with co-workers and clients.
- Excellent written and oral communication skills.
- A bachelor's degree is preferred with five years of business experience and proven success in a previous career.

Contact Ms Biz today at Christina@MsBizRadio.com or call 972.831.8866

Ms. Biz with all the biz a Ms. needs to know in personal finances and in life.

Ms. Biz can be heard weekly on

1080 KRLD

Saturdays 3-4 PM

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