

Job Title

Financial Advisor

Short Description

Your career path should lead to real opportunity.

LPL Financial partners with credit unions to offer a complete menu of financial services to credit union clients. This employment opportunity at Jax Federal Credit Union would allow you to join the Investment Program at Jax Federal Credit Union as a Financial Advisor associated with LPL Financial. Under this model Financial Advisors are not employees of LPL Financial.

The Investment Program at Jax Federal Credit Union supports the local community with a complete menu of financial services. You will join a team that is dedicated to helping members in every stage of their financial life.

This exciting position will allow you to grow your career and business, helping the people and families that look to Jax Federal Credit Union for financial solutions. This position will offer:

- The ability to service an existing book of business upon hire
- The ability to build a strong client base with the credit union's exceptional referral system
- Several branch territories with significant deposit base, which includes current members who need an advisor to support their financial goals
- The opportunity to find new clients via the credit union's member base
- The opportunity to create client solutions without proprietary products
- The ability to grow your business with LPL's combination of tools, technology, and support
- The benefit of LPL's experience helping financial institutions grow and maximize their investment programs
- The opportunity to capitalize on the credit union's reputation and community standing

As an advisor associated with LPL Financial, you benefit from our commitment to take care of you so you can take care of your clients. Your partnership includes:

- Access to our proprietary technology and a suite of customized services
- An open architecture platform with access to thousands of investment products from leading third-party product sponsors
- Resources and expertise across the firm to help you create client solutions
- The freedom to create solutions specific to your client's goals

Whatever your vision of success, we're with you every step

of the way.

By submitting an application, you are not applying for employment with LPL Financial. Employment is with Jax Federal Credit Union, however, in accordance with regulatory requirements, LPL Financial would hold your securities/insurance licenses.

As a Financial Advisor with Jax Federal Credit Union, you will help members achieve their long-term financial goals by providing them with exceptional personalized financial planning services and appropriate investment & insurance products.

Full Description

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Major Duties and Responsibilities:

Remain current with all professional licensing and continuing education requirements, as well as appropriate rules & regulations specified by FINRA, SEC, Florida Department of Financial Services, LPL Financial Services, and Jax Federal Credit Union.

Update professional knowledge base regarding latest investment and insurance products available to Jax Federal Credit Union members.

Collaborate with branch managers and staff to identify and leverage appropriate cross-sell opportunities, provide regular feedback to branch staff.

Cultivate referral business from credit union associates, current clients, community involvement, credit union events, and other sources as necessary to achieve overall sales goals

Offer personalized financial advice leading to long-term relationships based on trust and respect to Jax Federal Credit Union members.

Perform other related duties as assigned.

These investment products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, Jax Federal Credit Union.

Tracking # 1-05026674

Knowledge and Skills:

Experience:

Three or more years of investment sales experience.

Requirements: • Series 7 and 66 (63/65) required • Insurance license required

Education/Certifications/Licenses:

A college degree.

Interpersonal Skills:

A significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves extensive personal contact with others and/or is usually of a personal or sensitive nature. Work may involve motivating or influencing others. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary.

Other Skills:

Proficient with technology to include PC, Financial Planning Software, Order Entry, Microsoft Windows, Excel, Word and Outlook. Excellent organizational and communication skills.

ADA Requirements

Physical Requirements:

While performing the duties of this job, the employee is regularly required to use hands to finger, handle, or feel; reach with hands and arms and talk or hear. The employee is frequently required to sit. The employee is occasionally required to stand and walk. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and ability to adjust focus.

Working Conditions:

The noise level in the work environment is usually moderate.

Mental and/or Emotional Requirements:

Must be able to perform job functions independently or with limited supervision and work effectively either on own or as part of a team. Must be able to read and carry out various written instructions and follow oral instructions. Must be able to speak clearly and deliver information in a logical and understandable sequence. Must be capable of dealing calmly and professionally with numerous different personalities from diverse cultures at various levels within and outside of the organization and demonstrate highest

levels of customer service and discretion when dealing with the public. Must be able to perform responsibilities with composure under the stress of deadlines / requirements for extreme accuracy and quality and/or fast pace. Must be able to effectively handle multiple, simultaneous, and changing priorities. Must be capable of exercising highest level of discretion on both internal and external confidential matters.

Acknowledgment

Nothing in the position description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. This Job description is not a contract and should not be constructed as a guarantee of employment for any period of time.

We are an Equal Opportunity Employer and do not discriminate against employees or applicants based on race color, religion, sex/gender, national origin, disability, age, or any other category protected by law.

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| Education | A college degree. |
| Additional Comments | Please apply online by visiting: https://www.jaxfcu.org/careers/ |
| Credit Union | Jax Federal Credit Union |
| State | Florida |
| Contact Name | Aimee Haga |
| Email | ahaga@jaxfcu.org |
| Phone | 904-475-8023 |
| Fax | 904-350-9356 |
| Expiration Date | 03/24/2023 |