

Job Title: **Financial Advisor**

Reports To: Chief Operations Officer

Status: Full-time

*In this “war for talent”, we are always looking for successful advisors.*

### **Who can we impact?**

Experienced Advisors (5+ years)

- Whose current practice is tilted towards investment advice.
- An entrepreneur — not in the “institutional frame of mind.”
- An advisor interested in consultative versus transactional business.
- An advisor mostly fee-based versus commission-based.
- An advisor currently or aspiring to serve higher net-worth clientele through planning?
- An advisor who desires to be a part of an independent firm with open access to many solutions.
- An advisor interested in higher payouts.
- An advisor that wants access to alternative investment expertise.

Who are we NOT a fit for?

- Someone brand new to financial services.
- An advisor with a practice primarily compromising of insurance advice.
- A non-team player.
- An advisor in a maintenance mode versus a growth mode.

If you are interested in learning our story and how our due diligence lead us to our current structure, please contact our managing partner, **Gregory Randall** at [grandall@beaconplanners.com](mailto:grandall@beaconplanners.com) or 216.910.1855.

*Thank you for your interest in Beacon!*