

United States Jobs Expertini®

Financial Advisor - Santa Rosa, CA - Market 31, Region 048

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Company: Edward Jones

Location: United States

Category: business-and-financial-operations

If you find yourself at a professional crossroads, a career as a financial advisor may be the right change for you. Financial advisors partner with clients to help them achieve their long-term financial goals: retirement, building wealth, estate strategies, funding education and more. As a financial advisor with Edward Jones, you'll develop and grow your own practice, supported by your branch team, a home-office team and other regional financial advisors. You'll benefit from the experience that comes from 100 years of history. We're proud to have more offices in the U.S. and Canada than any other investment firm, serving over eight million clients.

Our financial advisors are valued partners, and we credit much of our success to their unique experiences and professional backgrounds. We value an inclusive environment where everyone's different viewpoints help to achieve results. Financial advisors lead the branch team to serve clients and contribute to the firm's purpose. They deeply understand the client's goals and why they are important to accelerate trust and help them stay on track. Edward Jones helps you positively impact clients' lives and work together to achieve their long-term financial goals, enabling you to make a difference in your community.

We'll give you the support you need. Our team will be there every step of the way, providing:

Paid training – Get registered and licensed and learn how to be a financial advisor with the

industry's top training program¹.

Salary for the first four years as you begin to build your practice²

A firm-provided branch office in the community

Branch office support to help lighten the load so you can focus on your clients

A support network that extends from your branch office to your region to the home office
– You'll work independently, but will have a team of thousands backing you every step of the way.

Benefits:

Includes bonus potential, 401K, and comprehensive health benefits

For more information please visit: [Edward Jones Benefits Page](#)

You can also expect...

No ceiling to your earning potential and growth, and your compensation is tied to the effort you put in

A compensation package that includes opportunities for commissions, profit sharing and incentive travel

The flexibility that you need to balance your personal and professional lives – the best of both worlds

A culture of continuous improvement and professional development

Key Responsibilities

Build relationships to create new clients via face-to-face and virtual sourcing strategies (residential, business, networking, introductions and referrals, social media, and speaking engagements).

Deeply understand clients' and prospective clients' needs, priorities, and concerns to accelerate trust and create personalized, comprehensive strategies to help them achieve their goals.

Oversee branch processes, roles, and responsibilities to ensure a high-quality, streamlined client experience consistent with firm policies and procedures, regulatory requirements, and ethical guidelines.

Engage the branch team to create, monitor, and adjust the branch business plan to increase branch effectiveness and achieve desired business results.

Create a highly engaging environment in the branch of mutual trust, respect, feedback and accountability.

1 For the 23rd consecutive year, Edward Jones was named a top company for training. The firm ranked No. 14 on Training magazine's prestigious 2023 Training APEX awards listed by Training magazine. 2023 Training Magazine Training Apex Award, published February 2023, date as of September 2022, an application fee was required for consideration

2 As your new asset compensation and commissions increase over the first four years, salary will decrease

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