

Director of Operations/EA in San Diego to join a top producing financial advisor as he expands his operations.

Great opportunity for someone that is detail-oriented, organized and excels in backend servicing. They would also have a decent amount of client-facing responsibility. Plenty of opportunities to obtain securities/life and health licenses (all expenses paid for) as well.

- Will be onsite for the first couple months, then one day a week (Friday) at home. If that works and they can be productive they can negotiate Wednesdays WFH too at FAs discretion.
- Meetings will be in person unless specified over Zoom/phone (this may happen often).
- 40 hours PTO per 6 months... rolls over.

Responsibilities include but are not limited to:

- Meeting confirmations/Calendar management
- Booking reviews/plan check ins
- Running birthday/age change reports
- HOLDING Financial Advisor TO BEING ORGANIZED AROUND HIS CALENDAR
- Running cash flow report: doing this monthly
- Inputting QS:
 - a. Will add a task in CRM with client and how many, put in same day or next
 - b. Assigning QS to other reps: will send over in an email, you will need to share the contact with the rep and assign a call
 - c. You also will be responsible for knowing our QS number every month and our progress toward that number every morning when we meet
- Underwriting/Onboarding:
 - d. All will be managed through CRM/tasks
 - e. ABSOLOUTELY OWN UNDERWRITING
 - f. Client check in meetings
- Billing issues/shortages: CALL HOME OFFICE IMMEDIATELY
- Licensing: Ensure all necessary licenses are applied for prior to clients completing first underwriting steps
- Requests to cancel/not continue: ALWAYS try to get them on the books for a 10-minute check in.
- Case prep: Refer to case notes template
- Investments: Opening/adjusting/closing of investments accounts
- Social Media

Compensation:

- 1) \$26.00 per hour plus bonus potential as follows:
- 2) Bonus will be based on quarterly FYC as a % of quarterly goal
 - a. 0-\$29k: No bonus

b. \$30-\$39k: \$1000

c. \$40-\$49k: \$1500

d. \$50k+: \$2000

- 3) There will be a Simple IRA that you will automatically be enrolled at 3% and I will match 1%
- 4) Bonus of \$1k for passing SIE, series 63 exams
- 5) Bonus of \$2k for passing series 7
- 6) Health insurance, dental/vision, life/disability insurance included
- 7) Rent, phone, parking will be paid for