

#GLADEOGRAPHIX PRESENTS FINANCIAL ADVISOR

PERSUADER PEOPLE PERSON ORGANIZER

RESPONSIBILITIES

INVESTING

- ▶ **Personal financial advisors** assess the financial needs of individuals and help them with investments, tax laws, and insurance decisions.
- ▶ **Advisors** help clients plan for short-term and long-term goals, such as education expenses and retirement.

MARKETING

- ▶ Many **personal financial advisors** spend a lot of time marketing their services, and they meet potential clients by giving seminars or through business and social networking.
- ▶ **Networking** is the process of meeting and exchanging information with people, or groups of people, who have similar interests.

SALARY

STARTING SALARY
\$32,3000

MID-CAREER SALARY
\$67,5000

LANDING 1ST JOB

- 1 Get an **internship** at a bank or brokerage to see if this is something you want to do.
- 2 Apply to one of these different types of companies:
 - Training program** with a large investment company: Such programs are competitive, but worth the work if you can get into them.
 - Smaller company:** You might not go through the same structured training regimen, but you'll have opportunities for one-on-one mentoring and be able to broaden your knowledge by performing several different tasks for different clients.
 - Financial analyst position at a bank.**
- 3 **Have a plan of attack:** Show the employer how you will find clients. Make it as detailed and realistic as possible.

EDUCATION

This is a client-based business. You are selling your services. So some clients require the right degrees or pedigrees.

Economics Accounting Math
Business Management Finance

Bachelor's Degree highly recommended. MBA recommended.

THINGS TO DO IN SCHOOL

- INTERN**
Try to get an internship at a financial company or for an independent financial advisor.
- MOCK PORTFOLIO**
Start your own mock portfolio with mock investments: Use Yahoo Finance or Market Watch.
- RESEARCH**
Read the trades and SEC info
www.investor.gov | www.sec.gov

REWARDING ASPECTS

- ★ You can work as hard and as little as you want. You determine how much you want to make.
- ★ Help people make money and create a financial plan for their future and family.

“In your interview - have a go-getting attitude, have a plan in place of how you're going to find your clients. Express with confidence and articulately why you're going to stand out. Accept rejection, create opportunities for yourself. If you want client's trust, prove yourself trustworthy.”

To learn more about this career, visit



WWW. **GLADEO**.org

Designed by Danny Shin