BLBB Advisors, LLC
Financial Advisor Associate
Job Description

Financial Advisor Associate

Financial Advisor Associates play a crucial role in nurturing current client connections, either collaboratively with a seasoned financial advisor or autonomously. Their responsibilities encompass crafting, conveying, and executing advice, managing portfolios, and fostering client relationships. While the primary focus is on enhancing existing client ties, Financial Advisor Associates may receive firm support in the pursuit of establishing new client relationships.

Hiring Manager: Cory Jackmuff, CIPM®, CHFC®
Job Location: Montgomeryville, PA
FLSA: Exempt

Major Areas of Responsibility:

- Relationship Management
    - Take on the role of the initial point of contact for the designated book of business and establish trustful connections with the firm's existing clients.
    - Leverage firm client relationship management (CRM) software to adhere to communication initiatives and scheduled tasks.
    - Perform basic portfolio administration tasks across multiple custodial platforms such as money movement and new account opening.
    - Remain up to date on industry trends and company initiatives and incorporate them as relevant.
- Portfolio Management
    - Monitor and execute portfolio management functions on a subset of portfolios assigned by other Financial Advisors.
    - Leverage BLBB’s technical resources to ensure consistency and take responsibility for portfolio construction details and management including asset allocation, cash management, tax loss harvesting, and annual required minimum distribution (RMD) completion.
    - Generate and approve appropriate trades using firm rebalancing software.
    - Implement changes in security selections and asset allocation across various portfolio models as directed by Financial Advisors and/or BLBB’s internal investment committee.
- Internal Committee Participation
    - Contribute to one or more internal committees tasked with formulating recommendations on asset allocation and/or security selection.
- Participate in special projects as assigned to assist with firm-wide initiatives and compliance requirements.

Required Knowledge, Skills, and Abilities:

- Proactive self-starter with ability to leverage available resources.
- Strong communicator both verbally and in writing.
- Detail oriented with focus on follow-up and task completion.
- Ability to foster trust with clients and colleagues.
- Devotion to client and work deadlines, compliance, and data confidentiality.
- Genuine interest in portfolio management strategy, capital markets, and in building meaningful client relationships.

Experience

- Three to five years in a client-facing investment advisory or financial planning role.
- Prior experience within client relationship management (CRM) software as well as experience using portfolio reporting and trading software.
- Envestnet Tamarac or SugarCRM experience a plus.
- Bachelor's degree preferred.

Benefits:

- Company paid health insurance
- Company funded Health Savings Account
- 401(k) with employer contribution
- Company paid Long Term Disability and Life Insurance
- Company paid Time Off
- Charitable Gift Matching and Volunteer Incentive programs through BLBB Charitable, the giving arm of BLBB Advisors
- Collaborative and supportive corporate culture

About BLB&B Advisors, LLC

Founded in 1964, we are an independent, SEC registered, employee-owned, multi-custodial financial advisory firm providing fiduciary advice, financial planning, and investment management services to individuals and families, endowments, and business owners. From our office in Montgomeryville, PA, BLBB Advisors manages approximately $2 billion dollars for more than 1,400 clients across 40 states and five countries.

We work closely with clients to help them navigate all aspects of their financial lives. Financial planning is used to develop appropriate investment objectives which BLBB then uses in the construction and management of risk-based client portfolios. BLBB Advisors uses individual stocks, individual bonds, and Exchange Traded Funds as the basis for portfolio construction.

Interested individuals should submit applications through LinkedIn or directly to cjackmuff@blbb.com.

For more information about BLBB Advisors, please visit our website www.BLBB.com.

BLBB is an equal opportunity employer.