Products Specialist– HJ Sims – Position Description

Do you a Bachelor's degree with 5 years of work experience in wealth/asset management? Are you skilled in due diligence, portfolio construction and investments? Do you have a passion for working with financial advisors, helping them to grow their business through wealth management products and services? Are you high-energy and driven? If so, HJ Sims, is looking to hire you as a Products Specialist for its Wealth Management Consulting Group (WMCG) in its Austin, TX location, considering candidates who live in or would relocate to the Boca Raton, FL, and Fairfield, CT areas. You will join a collaborative, collegial culture of bright, competent, hard-working people.

Candidate will:

- Perform highly technical tasks requiring individual judgement and initiative
- Assist in product training and rollout, and provide continued support for advisors
- Provide sales support for Sims Advisors and the Wealth Management department
- Assist advisors in developing asset allocations and investment plans for clients
- Have general knowledge of wealth management products (individual securities, alternatives, annuities, fee-based accounts, mutual funds and UITs)
- Be proficient in the wealth management consulting process
- Provide training to Registered Representatives to better serve their clients; present materials at seminars, including managing insurance registrations/licenses and continuing education requirements for advisors (fixed and variable business lines)
- Provide corporate level review of all new insurance business and serve as point of contact for insurance providers and field marketing offices
- Travel to private client offices periodically to make presentations and assist Managing Directors and advisors; may work in conjunction with advisors to present seminars for clients/prospects
- Actively support the initial rollout and adoption of wealth management products by advisors
- Interact with all members of team, including advisors, office personnel to drive understanding and success of broker/dealer wealth management products and services
- Review new managed account documentation for portfolio risk tolerance and completeness
- Assist with quarterly/semi-annual internal reviews of managed accounts
- Lead new product due diligence and ongoing due diligence of approved products
- Perform ongoing review of approved platforms to ensure HJ Sims is making available best-in-breed solutions to advisors
- Assist advisors with client onboarding for managed accounts
- Assists with billing set-up and ongoing fee disbursements

Position Requirements

- Four-year college degree
- Expertise in appropriate procedures and business concepts
- Minimum of five years of relevant experience
- Strong interpersonal skills, ability to work collegially
- Series 7 and 66 (or 65 and 63), and appropriate Insurance licenses; or if not, willingness to obtain them on a set schedule
- Travel required

Personal Qualities

- Excellent communications skills in writing, speaking, and presenting
- Strong analytical, problem-solving skills
- Highly motivated with a keen desire to learn
- Goal oriented with excellent time management skills
- Takes initiative
- Strong interpersonal skills
- Strong negotiating skills
- Able to stay calm, focused, prioritize and multi-task
- Trustworthy, energetic with a positive outlook sense of humor

If this position is a strong match for your background/experience, please email your resume to: karlahammond@sbcglobal.net **or 860-267-2690. HJ Sims**, established in 1935, is a full-service investment bank specializing in structuring and underwriting senior living and long term care financings, including tax exempt and taxable bonds, mezzanine loans, equity, seed money, bank financing, and FHA-insured loans. HJ Sims also provides financial advisory services in the areas of capital planning, restructuring and mergers & acquisitions. For more: www.hjsims.com.