

Product Specialist – Advisory and Brokerage

JOB DESCRIPTION: The focus of the role is to grow firm revenues by assisting Financial Advisors with organic growth opportunities and product support to meet the needs of clients.

Roles and Responsibilities:

- Program Support for New and Existing Advisors to Concorde
 - Generate, or assist in the generation of, client proposals, financial plans and/or investment policy statements, including providing guidance to Financial Advisors in these areas.
 - Communicate with advisors transitioning regarding existing client base in order to assist Financial Advisors in determining the appropriate program for client assets.
 - Proactively offer solutions to Financial Advisors regarding clients.
 - Continuously look to improve the value offered to clients for existing and transitioning Financial Advisors based on each unique situation presented.
 - Identify new opportunities to expand relationships.
 - Provide training and education to advisors and internal team.
 - Interact with third-party firms and sponsors for product updates and sales initiatives.
 - Additional responsibilities as determined by Concorde Executive Team.

Abilities Required

- A proven record of providing valuable customer service to clients.
- Prior sales experience a must.
- Experience using Advisory Portfolio Management, Financial Planning and Brokerage software.
- Proficiency in phone skills, including communicating with clients and representatives.
- Ability to multitask.
- Prior knowledge of hosting web based meetings.
- Strong ethics with the ability to exemplify the Concorde core values
- Effective communication skills
- Able to interface and work collaboratively with one or more teams
- Self-starter with a strong sense of accountability
- Must be able to proactively apply industry knowledge and experience to developing solutions
- High comfort level with technology and web-based applications
- Able to adapt quickly and easily with changing regulatory, corporate, and technological environment

Minimum Licensing and Requirements: Series 7, 63 and 65 or 66 required. Life & Health Insurance License preferred.