GREENBERG & RAPP
FINANCIAL GROUP, INC.

We are seeking individuals to join our team of professionals. There are a number of choices in today's marketplace, but for those interested in achieving the highest levels of success in the ultra-affluent and corporate markets, the exciting opportunities with **Greenberg & Rapp** stand apart:

- Access to exclusive, differentiated products and services
- Expertise and resources to enhance your client advocacy
- Independence to select solutions that best meet your clients' needs
- Preferred relationships with the most prestigious insurance carriers and investment companies nationwide
- Leading edge technology designed to improve efficiency and productivity
- Marketing and communications support
- Opportunities to collaborate with the industry's most successful producers
- The power of the 'M Brand'

With the M Financial brand behind you, your ability to compete for opportunities in the financial services markets is greatly enhanced.

THE POSITION

As an investment advisor, you will provide your clients with comprehensive financial planning and advice to help them effectively manage their financial wealth. You will recommend appropriate solutions, and once implemented, continually monitor for economic and personal change. This is a highly visible role focused on building long-term relationships with clients and key industry partners.

More specifically, responsibilities include:

- Generating leads for the sale of investment products to affluent individuals, business owners and corporations.
- Building a network of referral sources and tracking resultant opportunities.
- Research and analysis to prepare for client presentations and ongoing reviews.

- Evaluating clients' balance sheets, insurance coverage, tax status and financial objectives to offer holistic estate planning and customized recommendations.
- Assisting in the management of the current book of investment business.
- Identifying new cross-sale opportunities.
- Participating in seminars to remain current on industry trends and products.

THE CANDIDATE

Education/Certifications

- Undergraduate degree is required.
- The candidate will possess an advanced business, accounting or legal degree/certification or FINRA Series 7 and 66 Licenses.

Professional/Personal Qualifications

To perform the role successfully, an individual should demonstrate the following competencies:

- Highly driven and motivated person who thrives in a fast-paced, dynamic environment.
- Proven success in building assets through lead generation.
- Experience in identifying clients' financial needs and objectives, analyzing financial data, defining investment goals and creating wealth management solutions.
- Persistent individual needing little direction and enjoying an entrepreneurial sales culture.
- Well versed in the financial services industry with the ability to talk to clients at all levels.
- Networking strengths to develop strategic alliances and referral partnerships.
- Superior communication skills to be effective in small and large groups.
- Professional, reputable and highly respected member of the community.

If you're exploring new opportunities for yourself and your clients, we encourage you to consider joining our team at Greenberg & Rapp.

Please email Terry Clarke of TMCSearch Associates at TMCSearch@gmail.com or call (312) 735-6220 for a personal and confidential introductory discussion.