



Millennium Advisory Services, Inc.
a HUB International company

5340 Twin Hickory Road
Glen Allen, VA 23059
Toll-free: 877-435-2489

www.mas-edu.com

Millennium Advisory Services Inc., a HUB International company is looking for a motivated professional to join our team as a **Financial Planning Associate**. This position will be an integral part of Millennium's Financial Planning & Service Team and will be responsible for assisting our Investment Advisors in providing excellent service to our clients through the creation and maintenance of financial plans and the processing of client requests. The successful candidate must be a hands-on, service-oriented individual with exceptional organizational, communication and interpersonal skills. This position has the potential for advancement within the Financial Planning & Service Team, to an Investment Advisor role, and other roles throughout the company.

Job Responsibilities

Responsibilities of this position include, but are not limited to:

- Promote and enhance client relationships, from the onboarding of a new client to the continued service provided for existing clients, including communication with clients to process requests, resolve inquiries, and update key information
- Communicate professionally with clients via phone or written correspondence
- Input financial planning data in eMoney based on advisor notes from new client meetings and client reviews
- Review, organize, process, and submit completed client paperwork to custodians, and track requests to completion
- Input detailed client notes into Redtail CRM (Client Relationship Management Software)
- Coordinate with Investment Advisors to set up availability in scheduling software, set appointments, and communicate with clients to reschedule canceled appointments
- Maintain various regulatory documents for Financial Planning & Service Team and Compliance Department
- Coordinate with other teams to ensure all aspects of the client's accounts, financial plan, and investment portfolio are managed effectively
- Other projects and responsibilities may be added at the company's discretion

Job Qualifications

- Bachelor's Degree in Business or work experience in financial planning/financial services industry
- Currently holds Series 65 or ability to pass necessary securities license exam(s)
- Experience with goals-based planning software and client relationship management software is a plus
- Ability to handle multiple priorities, think critically, and problem solve in a rapidly changing environment
- Organized, accurate, detail-oriented
- Professional verbal and written communication skills
- Passion for helping others achieve their financial goals
- Proficiency in Microsoft Suite
- Willingness to learn new skills and processes



Millennium Advisory Services, Inc.
a HUB International company

5340 Twin Hickory Road
Glen Allen, VA 23059
Toll-free: 877-435-2489

www.mas-edu.com

Millennium Advisory Services is a fast-growing, fee-only financial planning and asset management firm headquartered in Richmond, Virginia. Our goal is to provide investment management services and financial planning advice that makes a meaningful difference in the lives of our clients. We offer our services to individuals across multiple states with a rapidly expanding client base. Our culture fosters a team-oriented, friendly work environment for our employees, and we offer a competitive salary and benefits package.

As a Registered Investment Advisory firm that is a part of HUB International, we have the backing of the largest privately owned global insurance broker, providing a broad array of property, casualty, risk management, life and health, employee benefits, investment and wealth management products and services. Becoming a part of HUB means that you thrive in an entrepreneurial and fast paced team environment supported by over 14,000 professionals in 500 offices across North America.

Millennium offers a competitive salary and benefits package. We foster a team-oriented, friendly environment for our employees, which provides a firm foundation on which to build lifelong relationships with our clients. We are seeking professional, passionate, and client-focused members to join our team.

HUB International Limited is an equal opportunity and affirmative action employer that does not discriminate on the basis of race/ethnicity, national origin, religion, age, color, sex, sexual orientation, gender identity, disability or veteran's status, or any other characteristic protected by local, state or federal laws, rules or regulations. The EEO is the Law poster and its supplement is available here at http://www.dol.gov/ofccp/regs/compliance/posters/ofccp_ost.htm.

Please apply via the HUB Careers page [here](#).

[EEOAA Policy](#)