



## *Millennium Advisory Services, Inc.*

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5340 Twin Hickory Road, Glen Allen, Virginia 23059  
Office: (804) 346-1040 Toll Free: (877) 435-2489 Fax: (804)346-1044

Millennium Advisory Services is a fast-growing, fee-only financial planning and asset management firm headquartered in Richmond, Virginia. We are expanding into the Indiana and Michigan region and looking for a self-starter who will work remotely with high independence to join our team as a **Financial Advisor**. The Financial Advisor is an integral part of the Advisor Services Team and will provide financial planning and advice services directly to retirement plan participants. Future opportunities to advance within the Advisor Services Team and throughout Millennium may exist.

### **Job Responsibilities**

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

- Conduct group presentations for retirement plan participants
- Meet one-on-one with retirement plan participants to answer questions about their retirement plan and provide goals based financial planning and advice services
- Complete necessary paperwork to establish managed account(s) as applicable
- Meet regularly with participants who have engaged Millennium for our managed account solution to review their retirement plan and/or other investment accounts
- Communicate professionally with clients via phone, written correspondence, or in-person for financial plan updates, account maintenance requests, and other functions as needed
- Maintain strong relationships with the plan sponsors of the retirement plans we work with
- Generating your own prospect list is not a requirement of this position
- Overnight travel is required. Travel expenses are paid by Millennium

### **Job Qualifications**

- 2-5+ years of experience in the financial planning profession preferred
- Experience working directly with retirement plan participants preferred
- Bachelor's degree
- Currently holds Series 65 or Series 66 or ability to pass necessary securities license exam(s)
- Currently holds CFP® or AIF® designation or willingness to meet the requirements to sit for the exam(s)
- Ability to handle multiple priorities with consistency and a strong attention to detail
- Ability to think critically and problem solve in a rapidly changing environment
- Passion for helping others achieve their financial goals

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 employees of higher education institutions as well as other individuals across multiple states with a rapidly expanding client base.

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.

Please send a cover letter and your resume to Jordan Smith via email at [jsmith@mcmva.com](mailto:jsmith@mcmva.com).

**EOE M/F/F/V/SO**

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