

Job Title: Advisor / Financial Planner	Job Level: Dependent on Experience
Location: Milwaukee, WI	Type of Position: Full Time
Exempt / Non Exempt: Exempt	Anticipated Start Date: 2022

Background of Heck Capital Advisors

Heck Capital Advisors, LLC is an independent investment advisory firm with a strong foundation. We have been serving individual and institutional clients with comprehensive investment services from the heart of Wisconsin, where Robert Heck first began the family’s investment legacy in the 1950’s.

Heck Capital Advisors is uniquely positioned to develop an exceptional relationship with our clients while providing competitive employment opportunities for our employees. Client referrals are a testament to our work and have allowed us to cultivate a national reach – assets under management, consultation & advisement of over \$7.5 billion in assets with client relationships in 38 states.

Essential Job Functions

The Advisor / Financial Planner is an integral part of the Advisory / Financial Planning team. The team is responsible for providing financial guidance to families, individuals, and institutions regarding their portfolios and investment strategies. We are seeking a candidate that is highly motivated, has a positive attitude, and is willing to work in a fast-paced environment.

The successful candidate will excel in the following areas:

- Providing sound financial advice to existing clients & future clients
- Identifying potential clients through referrals and build networking / Centers of Influence opportunities
- Preparing & Presenting Financial Plans
- Creates investment proposals for prospective clients
- Develops and maintains long term relationships

Requirements

- Bachelor’s Degree in related field
- Series 65 required
- Certified Financial Planner™ (CFP®) required
- 5 – 10 Years’ experience preferred
- Excellent oral and written communication skills.
- Presentation and organization skills
- Background in planning software a plus

How to Apply:

Send Resume and Cover Letter to:
 Heck Capital Advisors
 PO Box 738
 Rhinelander, WI 54501

Or Email: mbogard@heckcapital.com (Attn: Financial Planner / Advisor)

Benefits:

Insurance:	Health Insurance, Dental Insurance, Vision Insurance
Leave & Holiday:	Sick Leave, Paid Holidays, Paid Vacation
Retirement & Financial:	401(k) Plan, HSA, Potential for Profit Sharing
Other:	Fitness Reimbursement