



Licensed Professional

Organization Overview

Passage Wealth is an independent financial services practice located in Hoagland, IN. We are one of only ~25 practices nationwide to be part of the newly created Thrivent Advisor Network, a Registered Investment Advisor. This modern affiliation approach allows us the greatest flexibility to meet our client's needs. At Passage Wealth, we act as a reassuring guide, building authentic, faith-based relationships that help our clients open doors and unlock their financial potential. We take a broad-based approach to helping them achieve their financial goals by analyzing their current situation, developing in-depth financial programs, and helping them to implement an integrated financial strategy.

Position Summary

The Licensed Professional role serves as a key resource to our Financial Advisors and clients in handling, researching, and communicating activities related to the implementation of our client's financial goals and strategies. This professional role, along with peers within the practice, supports daily operations by utilizing our financial partners software programs in execution of investment and insurance related activities, which include but aren't limited to the following:

- Running and entering investment trade orders into trading platforms
- Provides account values and answers to other investment related questions for client accounts
- Prepares or coordinates the preparation of client correspondence, reports, and special projects
- Supports projects, administration of various programs, and processing functions as needed
- Assists Financial Advisors in the preparation and follow up for the client meetings
- Verbal or written communications with prospective or existing clients regarding financial matters
- Conducting substantive research or information gathering for the Financial Advisors that will be used to make investment recommendations and/or advice

Qualifications

- Associate or Bachelor's degree in related field preferred
- Obtain Series 65 License and Life & Health License within 3 months of hire date
- Ability to work effectively in a collaborative team environment
- Efficient organization, planning, multitasking, and time management skills
- Self-directed initiative
- Strong computer aptitude and knowledge of business tools and systems
- Detail oriented with ability to see tasks to completion
- Strong verbal and written communication skills.
- Flexibility to adjust to evolving client and practice needs
- Required to maintain integrity of sensitive & confidential information

Reassuring Guidance | Faith-Centered | Authentic Relationships | Lasting Legacy

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