Financial Consultant

Contact: TIAA

Email: tiaa@countyjobs.careers
https://al-etowah.countybuyselltrade.com/jobs/financial-consultant_ames_62330

Address:	**Ames**
Price:	**Check with seller**

DetailsApplyCOMPANY OVERVIEW: As long as there are people who make the world a better place, we'll keep making a difference for them. Since 1918, it has been TIAA's mission to serve those who serve others. It is this mission and the values we embrace that make us a different kind of financial services organization. When you work here at TIAA, you're not just in it for yourself. You are part of something bigger. A collective mission to make a difference - a collective mission we make our own. To be difference makers. For more information about TIAA, visit our website. POSITION SUMMARY: The Institutional Retirement - Financial Consultant is accountable for asset growth, asset retention, and provides counseling for all participants, new entrants, prospects, beneficiaries and their legal and financial representatives on the complete spectrum of TIAA products and services. This position is a professional level position with multi-pronged career path options after at least 18 months in role. The Financial Consultant will work a variety of schedules including evenings, early mornings and weekends. They will work additional hours during peak periods and may travel regularly, including overnight travel. KEY RESPONSIBILITIES AND DUTIES: Provide a broad range of financial consulting/planning services to our individual customers/participants at existing mega and large institutions and/or our k-12 new markets, ensuring asset retention and growth. Accountable for making TIAA the primary relationship (first call) for customers in need of distinctive advice, products and services related toachieving their long-term financial goals. Sale and delivery of all products and services including retail mutual funds, annuities, IRAs, 529, 403b bank products, life insurance and others. Counsel participants on their pension plans, tax deferred annuities and available investment options, educate, recommend and facilitate new purchases and provide authoritative information upon which important personal financial planning decisions are based. Develop and maintain strong relationship with Institutional Plan Sponsors. Conducts Financial Education Seminars to include participates in benefits fairs and leads plan enrollment seminars in order to increase participation in TIAA products and services. Interacts with participants and their representatives in-person (in the office and at the institution), by telephone and by e-mail/written correspondence. Must comply with all regulatory requirements and remain in good standing with regulatory agencies. Strong emphasis on services, sales, customer satisfaction and retention objectives. QUALIFICATIONS: Required: Bachelor's degree required 3-6 years of client service or financial sales experience required Travel required -Valid U.S. Driver's License required FINRA Series 7 and 63 required at time application Preferred: State Insurance Licensing -Professional designation strongly desired: CLU, ChFC, etc. Expert knowledge of financial planning

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