SJS Investment Services

Job Title: Senior Advisor
Reports to: Managing Director, Advisory Services
Location: On-site

Position Overview

The Senior Advisor serves as the primary relationship manager for clients, delivering comprehensive financial planning and investment advice while guiding complex planning decisions and ensuring an exceptional client experience. This role plays a key part in the firm's growth by developing referral relationships, cultivating centers of influence, managing prospective client opportunities, and contributing to revenue and asset growth objectives. As a senior member of the advisory team, the Senior Advisor provides leadership and mentorship to developing Associate Advisors and Advisors while collaborating across the firm to deliver high-quality advice, service, and client outcomes.

How We Work

- Operates in a capacity that always places client interests first
- Follows a disciplined, evidence-based investment process (MarketPlus® Investing) focused on long-term outcomes, not speculation
- Delivers planning-led advice integrating investments, tax strategy, retirement, and cash flow
- Team-based model that leverages collective expertise rather than individual silos
- Coordinates and builds relationships with clients' CPAs, attorneys, and other professionals to deliver integrated advice
- Maintains a transparent, fee-based structure aligned with client outcomes

Key Responsibilities

Client Advisor & Relationship Management

- Serve as the primary relationship manager for assigned clients, maintaining and deepening relationships while identifying opportunities to expand client engagement.
- Lead client meetings and presentations, guiding discussions and delivering comprehensive financial plans across investments, tax strategy, retirement, cash flow, and other planning areas.
- Provide proactive, forward-looking advice and lead advanced planning strategies for complex client situations.
- Monitor client portfolios and ensure alignment with client goals, firm investment philosophy, and appropriate risk management practices.
- Oversee implementation of planning recommendations, coordinate client service activities, and serve as the primary point of contact for client inquiries.

SJS Investment Services®

Business Development & Firm Growth

- Lead prospect discovery and proposal meetings, effectively communicating the firm's planning approach and value proposition.
- Develop, manage, and advance a consistent pipeline of prospective clients through referrals, professional networks, community involvement, and other business development activities.
- Cultivate and maintain strategic referral relationships with centers of influence, including CPAs, attorneys, business owners, and other professional partners.
- Drive organic growth by generating and converting new client opportunities, expanding existing client relationships, and contributing to the achievement of firm revenue and asset growth objectives.
- Represent the firm in networking events, professional associations, community organizations, and marketing initiatives to enhance visibility and generate new business opportunities.

Leadership & Team Development

- Lead and oversee a team responsible for analysis, planning, and implementation; delegate effectively while maintaining accountability for quality, accuracy, and client outcomes.
- Mentor and coach developing advisors on client relationship management, business development strategies, networking, and prospecting best practices.
- Collaborate with Associate Advisors, Advisors, Investment Strategists, and other team members to deliver integrated advice and a consistent client experience.

Qualifications & Experience

- Bachelor's degree in Finance, Economics, Accounting, or a related field preferred
- 7+ years of experience in the financial and investment fields, preferred
- Ability to manage client relationships and deliver comprehensive financial advice
- Knowledge of investments, tax planning, retirement strategies, and cash flow planning
- Preference for individuals holding CERTIFIED FINANCIAL PLANNER™ (CFP®), Chartered Financial Analyst (CFA), and/or other comparable financial planning designation
- Strong analytical, problem-solving, and decision-making skills with the ability to evaluate complex financial situations
- Proven ability to lead, mentor, and develop team members while contributing to a collaborative work environment
- Excellent communication and client service skills, with the ability to clearly explain complex financial concepts
- Strong organizational and time-management skills, with the ability to manage competing priorities and follow through on commitments
- Proficiency with Microsoft Office, financial planning software, CRM systems, and portfolio management tools

Key Personal Attributes

- Relationship-oriented with a strong client-first mindset
- Strategic thinker with the ability to translate complexity into actionable advice
- High level of integrity, professionalism, and sound judgment
- Self-motivated with a strong sense of ownership and accountability
- Collaborative and team-oriented, fostering strong relationships across the firm
- Adaptable and comfortable operating in a dynamic environment
- Growth-minded with an interest in developing client relationships and contributing to firm success

Success Expectations

- Strong client retention and relationship growth
- Consistent delivery of high-quality financial planning and advisory services
- Meaningful contribution to new client acquisition, revenue growth, and asset growth
- Development of productive referral and professional partner relationships
- Effective leadership, mentorship, and development of less experienced advisors
- Positive contributions to team collaboration, firm culture, and operational excellence