FPA NCA
FINANCIAL PLANNING ASSOCIATION
NATIONAL CAPITAL AREA

CLASSIFIED CONNECTION

Volume 3, No. 12, December, 2011
Web address: www.fpanca.org

FPA NCA CLASSIFIED CONNECTION GUIDELINES FOR ALL ADVERTISING:

1. The FPA NCA Classified Connection is a member benefit professional development newsletter to include job postings, mentoring and internship programs, job seeker resumes of CFP® certificant professionals and candidates attending local college/university programs, invitation to CFP® certificant exam study groups, and scholarships and award announcements. The FPA NCA does not recommend and/or endorse any particular advertisement
2. No graphics, logos, or pictures associated with any advertisements will be included in this advertising publication.
3. FPA NCA has the right to refuse or modify any ads submitted prior to publication.
4. Ads must be submitted in Microsoft WORD format.
5. Ads must be submitted by the 20th of each month for inclusion in the next month's publication.
6. This advertising newsletter will be posted to our local chapter web site (www.fpanca.org) and announced via email to our members.
7. Changes to a published ad or removal of the ad will occur once a month prior to the new publication being posted and announced. Notices of changes and/or removals must be submitted by the 20th of each month.
8. Ads will be published for three consecutive months. Requests for ads to be reinstated after the initial three months must be sent by the 20th of the month for inclusion in the next month's publication.

Thank you for following these guidelines so that we can post your advertisement quickly and efficiently! You may send your ads to PeggyNelson8@verizon.net. Thank you!

Hiring Experienced FINANCIAL ADVISORS

MANNA Capital Management - Washington D.C. Metro Area

Job Description

We are an established Wealth Management firm and are looking to expand our investment team in Falls Church, VA. We are seeking an experienced Financial Advisor. Our firm is an independent Broker/Dealer dating back to 1962.

All qualified candidates should email a word version of their resume to the contact information provided. The position requires a person who is highly motivated and detail oriented.

Job Responsibilities:

• Draft investment proposals for prospective clients. This includes commenting on their existing holdings and effectively communicating how our investment strategies will enhance their portfolio.
• Complete various financial planning projects for current clients (i.e. retirement projections, college funding, estate planning, etc.) Via Financial Planning Software.
• Engage in Networking events weekly (Chamber of Commerce etc)
• Develop full use of CRM & update client files and maintain client database (salesforce.com) and coordinate Marketing campaigns for prospects and clients
• Quarterly Workshops and or Seminars and other special client events for Lead Generation
• Reach out to old clients whom have not been contacted in years and rekindle the relationship

Desired Skills & Experience

Ideal Candidate Skills/Characteristics:
• Must demonstrate ability to bring in New Clients
• Must have understanding of the markets
• MUST hold FINRA Series 7 license. State approved health and life insurance licenses highly desirable.
• Excellent command of the written English language is NECESSARY.
• Personal interest in investing is a PLUS.
• 2-4 years relevant job experience.
• Working knowledge of Microsoft Office and related business productivity tools.
• Ability to manage competing priorities in a timely fashion.
• Mental acuity to work independently, but also function in a team environment when the situation dictates.
• Strong attention to detail and systematic follow thru with Prospects and Clients
• Ability to communicate information in a clear, concise, and professional manner.

Company Description

To learn more please visit: www.MANNACapitalManagement.com

Additional Information

Type:	Full-time	
Experience:	Associate	
Functions:	Customer Service, Sales, Business Development	
Industries:	Investment Management	
Compensation:	Draw $55,000 + Commission for first 24 months	11/2011

Deborah Latimer
7025 Enterprise Ave.
McLean, VA. 22101
(703) 801-9455
debbieltmr@aol.com

Spire Investment Partners McLean, Virginia 2011

Executive Assistant

- Function as point of contact for busy financial advisor, arrange calendar, screen calls, schedule meetings and manage steady flow of client requests.
- Understand organizational flow of industry and respond to technical queries.
- Process new accounts and related maintenance functions at *Fidelity, NFS* and *Schwab* platforms.
- Generate portfolio reviews in *Morningstar* and *Albridge* account management systems.
- Process client disbursement requests, including electronic transfers, wires, journals and checks.
- Process alternative investment materials at *Atlas Resources* and *Cole Real Estate* companies.
- Operate *Redtail Client Relationship Management System*.

American Association of Colleges of Nursing Washington, D.C. 2003--2009

Gerontology Project Manager

- Managed two multi-million dollar gerontological nursing education grants.
- Co-authored a final project monograph, wrote narratives for association's web site.
- Synthesized material from a variety of sources, wrote detailed bi-annual report summaries.
- Planned three scholar leadership conferences: led discussions/panels, organized interactive activities.
- Headed $500,000 minority nurse faculty scholarship program.
- Recruited application review panel members and mediated discussions to determine scholarship awardees.

Brain Injury Services, Inc. Springfield, Virginia 1989--2003

Case Manager and Community Outreach Specialist

- Designed case management system for start-up non-profit.
- Chaired monthly client review board meetings.
- Wrote persuasive letters petitioning local governments for services.
- Generated written outlines for outreach presentations and professional education seminars.
- Negotiated social service maze to work for Northern Virginia brain injury survivors.
- Provided oversight to junior staff members.

EDUCATION Master of Social Work Washington University St. Louis, MO

References are available upon request.

STUDY GROUPS RETURNING!

BEGINNER (PRACTICE MANGEMENT): This practice management concentration group is designed to cover best practice and operational topics. The mission of this study group is to help advisors and staff members to be effective, efficient and grow through systems and processes. Members should have one to five-years of financial advisory services. The group meets bi-monthly for two hours on a Friday. Please contact Bonnie J. Armstrong for additional information.

INTERMEDIATE (INVESTMENT PLANNING): This Intermediate Group is ideal for RIA and CFP® certificants. This group will focus on current and proposed rules, investment strategies, and important financial topics such as but not limited to retirement planning, estate planning in the ever evolving environment. They affect and effect advisors in servicing clients. The group will meet bi-monthly for two to three hours. A future meeting will be scheduled upon format of a core group. Please contact Bonnie J. Armstrong for additional information.

ADVANCED: This Advanced Group is ideal for CFP® certificants, financial advisory firm principals or key people of a financial planning firm, who have unique organziational challenges, in addition to an advisory role to clients. Individuals should have a minimum of 10-years of experience in financial advisory services. The group meets quarterly for half a day. You may register by contacting Bonnie J. Armstrong for additional information.

CONTACT INFORMATION: Bonnie J. Armstrong
Office Phone: (703) 378-2620 Cell Phone: (703) 819-8545
E-mail: Bonnie@StrongPracticeSolutions.com

Group Sales Consultant in Washington DC

This position is responsible for the sales of 401K and 403b plans to small to midsize organizations. The requirements are an active FINRA series 6 and 63, past direct sales experience and ideally some retirement plan knowledge.

The position pays a base compensation of $50,000. There is a bonus that is between 20% and 80% of the base compensation. The majority of the bonus is based on performance. Salary increases are at increments of $5,000. There is also a company car and excellent benefits. This position is with a national organization that has never downsized and only promotes from within.

If there is any interest on your end or possibly by someone you know, please contact or send a resume to Alexis Aguilar at aaguilar@cps4jobs.com. 10/2011

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