FPA NCA
FINANCIAL PLANNING ASSOCIATION
NATIONAL CAPITAL AREA

CLASSIFIED CONNECTION

Volume 3, No. 11, November, 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!

POSITION OPENING

About us -
We are a successful fee-based financial planning and practice located in Annandale, VA. Our team is cohesive, collegial, flexible and professional. We strive to provide our clients with the best informed, thoughtful, intelligent advice while developing close, personal relationships with each of them. We aim to provide the highest level of customer service. A significant component of this service is our administrative support process.

About you –
You're an experienced administrative professional who is exceptionally well-organized, process- and detail-oriented but prides him/herself on relationships with colleagues and clients. You have very strong Microsoft Office skills. You love organizing things: paper, emails, calendars, projects and ideas. As a result, details rarely escape you. You must be a self-starter who is independent but is not afraid to ask for help or direction: you work well with direction but little supervision. You have the maturity and self-confidence to ask questions, take suggestions and "manage upwards". And in addition to all that, you love serving customers and people often comment on your warm and professional presence.

The Job Responsibilities –

- Provide exceptional service to our practice's clients
- Answer phones, greet clients, schedule appointments and manage calendars.
- Triage phone calls and incoming emails; determine best resources for quickest response.
- Prepare for Client Meetings and necessary follow up
- Prepare meeting summaries and financial recommendations for clients
- Create polished client correspondence and presentation materials using Word, Excel and PowerPoint and propriety programs.
- Providing instruction to clients for accessing various proprietary websites
- Maintain client data bases
- Coordinate client appreciation and community events
- Process investment and insurance applications and paperwork
- Office website development and updating
- Set appointments and manage meeting logistics

Excellent opportunity to learn about financial planning and investment strategies. If interested, there may be opportunities to help coordinate the development of financial plans, investment strategies and account management and maintenance.

Schedule can be part time to full time with flexible working hours. Successful candidate will be required to pass a drug screen and have the ability to be bonded. Local candidates only.

To apply-
We prefer industry experience in similar role and FINRA certification of Series 6 or 7 or ability to obtain. If you are a match please email your resume, cover letter (we'd love to see your communication skills) and salary history to: Lea.McCaw@LFG.com

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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

Boutique Fee-only Wealth Management Firm Seeking Financial Advisor with 3 – 5 years of hands-on experience including:

- preparing and presenting financial plans,
- monitoring and rebalancing client portfolios,
- new account processing, cashiering and trading activities.

Don't apply unless you are interested in becoming part of an energetic and supportive team of women, and you desire an opportunity for personal career growth. We are looking for someone with the skills and experience to immediately assume responsibility for monitoring our existing HNW client's accounts and providing day to day service support for them. You will be expected to hire and train your own assistant planner while also supporting our senior advisors.

Requirements:
Position requires a bachelor's degree and CFP designation plus 3 to 5 years experience in a similar capacity. Candidate must demonstrate: a high degree of personal integrity; strong verbal and written communication skills; interpersonal skills to effectively deal with all types of people; a desire to learn; strong analytical and problem-solving skills; and an ability to effectively work as a team member.

This position does not require that you bring assets with you, nor will it require any business development activities on your part. This is a full-time position located in Middleburg, Virginia.

Salary: $55,000 - $70,000, based upon experience.
Contact: middleburg.investments@gmail.com 8/2011

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

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
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