Job Title: Financial Advisor
Location: Hunt Valley, MD
Job Type: Full-Time
Department: Wealth Management
Reports To: Director of Investments

Job Overview

We are seeking a client-focused **Financial Advisor** to join our team. This position is ideal for a motivated professional who excels at building lasting client relationships, delivering comprehensive financial planning, and working collaboratively in a team-based environment.

As a key point of contact for your assigned client relationships, you'll provide strategic financial guidance across a wide range of areas - including cash flow, investments, insurance, taxes, retirement, and estate planning. This is an opportunity to play a meaningful role in helping clients achieve their financial goals while growing with a supportive and value-driven firm.

Key Responsibilities

- Serve as the primary advisor for a portfolio of clients, providing high-touch, personalized service
- Conduct regular client meetings to review goals, life changes, and portfolio performance
- Develop and deliver customized financial and investment recommendations
- Identify new assets and planning opportunities within the current book of business
- Handle financial planning tasks such as data analysis, reports, and plan creation
- Guide clients through life events such as home purchases, education planning, insurance needs, and retirement transitions
- Execute trading and rebalancing strategies; ensure proper investment allocations
- Manage client accounts, transactions, documentation, and reporting using firm systems
- Support onboarding of clients from newly acquired firms
- Present 401(k) education sessions to plan participants
- Maintain accurate client records and track sales pipeline in CRM
- Participate in internal projects, task groups, and ongoing training
- Stay compliant with industry regulations and company policies
- Collaborate cross-functionally with internal teams and escalate complex issues to partners

What We're Looking For

Core Competencies:

- Proven ability to maintain confidentiality and demonstrate integrity
- Strong initiative and problem-solving skills
- Exceptional communication—both written and verbal

- Outstanding organizational and time management abilities
- Analytical thinker with attention to detail and a “big picture” mindset
- Comfortable with technology and able to quickly learn new tools
- Calm, professional demeanor—even under pressure
- Collaborative, flexible, and proactive team player
- Passionate about exceeding expectations and delivering value to clients

Qualifications

- Bachelor's degree in Finance, Economics, Business, or a related field
- Certified Financial Planner (CFP®) designation strongly preferred
- Minimum 3-5 years of experience in financial advising or wealth management
- Experience managing and growing client relationships
- Proficiency with financial planning software, CRM systems, and portfolio management tools such as Salesforce, Orion, Y Charts (preferred)
- Series 65

Why Join Us?

Marshall Financial Group offers a unique opportunity to join a growing firm that values integrity, collaboration, and client-focused service. With a strong emphasis on professional growth, work-life balance, and a supportive culture, team members enjoy meaningful work, autonomy, and the ability to make a real impact. The firm’s deep client relationships, ethical foundation, and long-standing reputation make it an ideal place for professionals who are passionate about helping others while growing their own careers.

How to Apply

Please submit your resume to careers@marshallfinancialgroup.com. We look forward to hearing from you!