

JOB DESCRIPTION

Financial Advisor

South Louisiana Financial Services/Investment Division

Typical hours of work: Monday – Friday 8am-5pm

Reports to: Gene Songy, Financial Advisor

Essential Duties:

- Meeting with clients to determine their financial objectives, risk tolerance, income, expenses and assets
- Offering strategic advice on products and services, such as investments and insurance coverage
- Moving money from accounts per industry and federal regulations
- Performing market research to stay current with financial trends
- Preparing financial documents, such as income projections and investment reports
- Maintaining compliance with all rules and regulations in the financial industry
- Identifying and pursuing potential clients to maintain a strong client base

Qualifications of Job:

- Securities and insurance licenses (if not currently licensed, will allow for preparation and testing within allotted time frame. Licenses must be obtained within the time period.)
- Business-related Bachelor's Degree preferred or designated as Certified Financial Planner™ through CFP Board certification program preferred

Requirements:

While performing duties, the employee is required to sit, stoop, lift up to 10 pounds, type, have the ability to communicate effectively with others, and will be required to work evenings and/or weekends, attend remote meetings/trainings and/or travel.

In the performance of respective task and duties, the employee is expected to conform to the following:

- Successfully perform quality work within deadlines with or without supervision
- Interact professionally and confidently with other employees, clients and contacts
- Work effectively as a team contributor on all assignments
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations

This job description in no way should be construed as a contract for employment. These job duties may be subject to change at any time due to reasonable accommodation or other reasons. Nothing in this job description restricts management's rights to assign or reassign duties and responsibilities to the job at any time.

South Louisiana Bank is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran, or disability status.