



Haviland & Sams
ADVANCED FINANCIAL STRATEGIES

Job Description

Job Title: [Associate Financial Advisor](#)

Haviland & Sams, LLC is a financial planning and financial advisory firm offering an [**Associate Financial Advisor**](#) position. We are an independent, fee-only firm, dedicated to the preservation, protection, and growth of clients' private wealth. As a Registered Investment Advisor, we offer sophisticated financial affairs planning and financial management services to individuals and families.

This is an excellent opportunity for a dedicated professional seeking educational support and career growth. The individual selected will work in a client-facing role, alongside senior advisors in the development and implementation of financial plans.

SKILLS & EXPERIENCE

- Solid understanding of comprehensive financial planning fundamentals, such as financial modeling, investment monitoring and management, retirement planning, income taxation, and estate planning
- Broad experience with fiduciary practices and risk management controls, and deep commitment to compliance with all applicable policies and procedures
- Familiarity with or ability to master financial planning and CRM platforms
- Proficiency in Word, Excel, PowerPoint, and Outlook
- Ability to multi-task and prioritize client responsibilities and independent tasks, managing workflow and timely meeting deadlines
- Consistent exercise of professional discretion, analytical reasoning, attention to detail, and exceptional written, oral, and interpersonal skills

EDUCATION / QUALIFICATIONS

- Bachelor's degree or higher
- 1 to 5 years work experience in the financial services industry
- CFP® designation or CFP® candidate preferred
- Series 65 license required (before or within 3 months of hiring)

TO APPLY, please send your resume, including cover letter, and salary history and requirements to Benjamin B. Sams at bsams@havilandsams.com or fax to Haviland & Sams, LLC at (860) 678-1616.