

WEALTHVEST MARKETING

Position Available // Marketing Consultant

WealthVest Marketing is a financial services distribution firm that assists Advisors with their clients' retirement needs. Over 10,000 members of the "baby boom" generation are retiring daily, and to prepare for this inevitable day, Americans have purchased over \$14 trillion in mutual funds and annuities to protect their golden years.

WealthVest designs, markets, and distributes these essential building blocks of retirement savings for financial advisors throughout the nation.

MARKETING CONSULTANT

WealthVest does not work with direct investors, we support the major banks and broker-dealers nationwide, offering them product analysis, marketing assistance, operational service and investment solution recommendations.

As you progress at WealthVest, you will become adept at many aspects of financial planning and investing, allowing you to take on greater national marketing and sales responsibility.

KEY RESPONSIBILITIES:

- // Develop industry knowledge on mutual funds, bonds, stocks and other long-term savings products.
- // Effectively position investment solutions with advisors and agents
- // Train Advisors in all aspects of the WealthVest value add program – Social Media Marketing, Consumer Seminar Marketing and Brand Establishment
- // Build an understanding of key competitors to WealthVest and maintain the ability to effectively position the firm against them with advisors and agents

REQUIREMENTS:

- // Bachelor's Degree
- // Financial services experience (preferred)
- // Obtain Montana Insurance license within 3 months of hire

CHARACTERISTICS:

- // Highly intelligent, highly competitive individuals that want to be trained in financial services
- // Excellent interpersonal skills, strong academic background, competitive sports experience
- // Entrepreneurial experience is highly desirable

BENEFITS:

- // Bozeman Voted Best Place to Live - New York Post
- // Bozeman Voted Best Place to Live - Outside Magazine
- // Base salary plus bonuses
- // Health Insurance with Dental and Vision
- // 401K
- // 26 days off per year

Please send resume to: nneustrom@wealthvest.com

