Searcy™
FINANCIAL
Where you stand.

Join Our Team

Current Available Positions:

Vice President of Business Development

Financial Planning Associate

Client Service Associate

Administrative Assistant to the Client Services Team

Internship/Professional Residency

Additional Availability For:

Succession & Continuity Planning for Investment Advisors

Breakaway Brokers

Vice President of Business Development

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For the intensely motivated and driven professional who:

- believes that outcome is directly proportionate to effort, and
- has the highest degree of integrity and ethics.

Your ability to roll up your sleeves and do what it takes to close private client business will pave the way to unparalleled career growth and will ensure your financial success in our highly competitive and uncapped compensation structure. The VP of Business Development is assertive, competitive, and strong willed, with a sense of urgency. You should be able to embrace sales objectives and aim for exceeding sales metrics goals by having an established demonstrable sales and planning process.

The firm is dynamic in its approach to day to day operations supporting the efforts of the VP of Business Development. Ongoing private client relationship management, marketing and communications, technology, investment management and financial planning support are provided by a highly competent back-office, management, and advisory team. Your responsibility is to generate new business opportunities and to support revenue and profitability goals through the process of prospecting, lead generation and closure of sales. This individual will develop and maintain a high-level understanding of the private client solutions Searcy Financial Services offers and collaborate with the internal team to prepare proposals and presentations to close business and further the relationships.

Candidates should have a Bachelor's degree and a minimum of 5-7 years of experience in Financial Services sales OR 5-7 years of B2C professional sales experience. FINRA Series 65 licensing is preferred.

Those interested should click the link below and complete each step of the application process: http://www.cindexinc.com/c/2A0E06

Searcy Financial Services, Inc. enforces a strict no tobacco policy (including e-cigarettes) both at work and after hours. Please do not apply for this position if you will not abide by this policy.

Financial Planning Associate

Are you ready to take the next step in your career as a financial planner? Or have you been working at a firm that's just not quite the right fit for you and you're looking for a company that aligns better with your values?

This is a perfect position for anyone looking to advance their career and have an opportunity to expand on their education and experience in financial planning. The position provides support to clients and Lead Advisors, including organizing client meetings, collecting client data, responding to administrative client queries, preparing client correspondence and reporting, investment research, and supporting firm-level initiatives. If you're looking for a fast-paced and challenging career opportunity, this could be a perfect fit. A detailed personal development plan, weekly one-on-one meetings, annual employee review meetings, quarterly personal development initiatives, and ongoing training and mentoring make this firm a great place to learn and grow.

This position is a steppingstone for eventual advancement into a Lead Advisor role and expanded client relationship management responsibilities for the right candidate.

Candidates must have a bachelor's degree in human ecology, financial planning, psychology, finance or another related field. All candidates must have a FINRA series 65 or be able to pass the exam as a prerequisite to employment. CFP® professionals (or those eligible to become CFP® professionals once experience requirements are met) are preferred.

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Client Service Associate

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Are you ready to begin your career as a financial planner? Or have you been working at a firm that's just not quite the right fit for you?

This is an entry-level position perfect for anyone looking to advance their career and have an opportunity to learn the business from the ground up. The position provides non-advice related support to clients, including organizing client meetings, collecting client data, responding to administrative client queries, preparing client correspondence and reporting, and supporting firm-level initiatives. If you're looking for a fast-paced and challenging career opportunity, this could be a perfect fit. A detailed personal development plan, weekly one-on-one meetings, annual employee review meetings, quarterly personal development initiatives, and ongoing training and mentoring make this firm a great place to learn and grow.

Candidates must have a bachelor's degree in human ecology, financial planning, psychology, finance, general business, communications, or another related field. This position is a steppingstone for eventual advancement into a Financial Planning Associate or Financial Paraplanner Qualified Professional™ position.

Those interested should click the link below and complete each step of the application process: http://www.cindexinc.com/c/2A0E06

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Administrative Assistant to the Client Services Team

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We are looking for a responsible Administrative Assistant to perform a variety of administrative and clerical tasks from our Overland Park office. Duties of the Administrative Assistant include providing support to our partners, employees and clients, assisting in daily office needs and managing our company's general administrative activities. This person is responsible for delivering an exceptional client experience and redeeming the time of the Client Services Team.

This could be a part-time or full-time position for the right person. Could be ideal for someone who has been out of the work force for a bit and looking for work while children are at school. Minimum of 25 hours per week required.

The ideal candidate should have excellent oral and written communication skills and be able to organize their work using tools, like MS Excel and office equipment. Must have an optimistic and cheerful disposition. Must be reliable, trustworthy and punctual.

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Responsibilities

- In short, this person will look for opportunities to provide support to other team members and clients.
- Greets guests on arrival, manages incoming phone calls, transfers and messages, performs clerical duties as assigned, and provide general support to the Client Services Team.
- Provides high-quality general administrative support to both external and internal clients, such as electronic filing, preparing and sending letters and communications, arranging appointments, managing calendars, coordinating the conference rooms usage and availability, assisting with meeting meals, office management, travel arrangements, and other clerical duties.
- Maintains the lobby, conference rooms and common areas, keeping them free of clutter and notifying the office manager when additional maintenance is required.
- Supports the business with implementation of marketing or sales-related activities.
- Responsibilities may include working with the Director of Marketing for event coordination, lunch & learns, and the preparation or replenishing of firm marketing materials.
- This individual is generally the first point of contact, responsible for a guest/caller's first impression.

Skills/Traits

- Kind, optimistic, cheerful disposition
- Punctual, reliable, trustworthy
- Attention to detail and organization
- Proven experience as an administrative assistant or office admin assistant
- Knowledge of office management systems and procedures
- Working knowledge of office equipment, like printers and scanners
- Proficiency in MS Office
- Excellent time management skills and the ability to prioritize work in a deadline-driven environment
- Excellent written and verbal communication skills
- Strong organizational skills with the ability to multi-task
- High School degree; additional qualifications, Associates degree, or experience as an administrative assistant will be a plus

Internship/ Professional Residency

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Are you looking for a better understanding of the roles, responsibilities and functions within an independent RIA firm?

An internship with the Searcy group of companies exposes students to a broad range of responsibilities. You will be trained on both the "why" and "how" of firm operations before carrying out these responsibilities which may include new client set-up, set-up and maintenance of financial plans, ongoing account maintenance and client service requests, investment research and reporting, and supporting firm-level initiatives. We pride ourselves on being a strengths-based firm, so personal development and mentoring will be a good portion of the internship experience. You will also learn the requirements necessary for future positions and career paths within the firm.

Note: Full-time positions are limited and in high demand, so dress to impress and put your best foot forward during your time as an intern.

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Succession & Continuity Planning for Investment Advisors

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Are you looking to build a continuity plan for your business or to build a succession plan for your practice?

According to industry research, the median age of wealth management firm owners is 49 years and yet only 45% of owners have a working succession plan in place. Failure to adequately plan can lead to disruption in client service, irreparable damage to the business reputation, and vulnerability of your spouse, children and other dependents. A continuity plan protects the interests of the firm in the event of a catastrophe while a succession plan provides for the future of the firm, such as an owner's retirement. If you don't have an internal continuity or succession plan, we would be happy to explore how Searcy Financial Services, Inc. could be a resource for an external continuity and/or succession plan for your practice. Please contact us if you are interested in exploring this opportunity.

Breakaway Brokers

Are you thinking about leaving your brokerage firm and going independent?

The financial commitment and regulatory requirements could be a roadblock for advisors who want to stay focused on client relationships and business development. Joining Searcy Financial Services, Inc. may be a perfect solution. We have the infrastructure in place and are able to provide compliance, back office support and the technology that is critical to success. Not all advisors will be a good fit for our organization or culture, but we are open to discussions. Please contact us if you are interested in exploring this opportunity.