John McKeon & Associates Insurance & Financial Services, Inc.
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Financial Advisor Job Description

July 4, 2023

McKeon Financial, a growing independent financial planning firm, is seeking a Financial Advisor who can immediately assist in providing high quality service to our existing and future securities clients. The Financial Advisor would be directly mentored by John McKeon, President and Registered Principal of McKeon Financial, and would initially assist our firm in serving our existing clients, prior to bringing new clients to our firm. This is a fantastic opportunity to learn from and to grow a career with a successful, unique, and proven firm.

McKeon Financial is an independent financial planning firm specializing in a wide range of alternative investments. We provide institutional and institution-like investment opportunities for the retail customer. We principally serve medium to high-net-worth individuals and entities, anywhere in the U.S., who seek to diversify their assets beyond the stock and bond markets. Our mission at McKeon Financial is to help our clients make informed decisions through exceptional education, communication, and service.

Requirements:
- A bachelor's degree (in any discipline) from an accredited college or university.
- A clean background history.
- A clean U-4 and U-5 history if already securities licensed.

Knowledge, Skills, and Abilities:
- Excellent verbal, written, presentation, and interpersonal communication skills.
- Excellent relationship management and superior business development skills.
- Excellent attitude and extraordinary client service orientation.
- Strong attention to detail and accuracy.
- Excellent organizational and time management skills.
- Proficiency with Microsoft Office Suite, especially Excel.
- Sincere interest in serving and caring for clients.

Industry Experience:
- Experience in the Financial Services Industry or other related industries strongly preferred.
- A Certified Financial Planner™ (CFP®) preferred.
- Active Series 7 and Series 63 and 65 or 66 Securities Licenses strongly preferred.
- Active Washington State Life and Disability Insurance Licenses preferred.

    Note: If not already Insurance and Securities Licensed, candidates are required to complete the above licensing exams within 18 months at our firm. Studying for these exams is done on your own time.

Responsibilities and Activities:
- Learn everyone's position and responsibilities at our firm.
- Work closely with, be mentored by, and assist the Firm's Registered Principal.
- Attend client meetings, documenting them into our Client Database System.
- Assist in research and in developing client presentations.
- Assist interested clients in developing financial plans, utilizing planning software.
- Assist with Life, Long Term Care, and Annuity Insurance cases as needed.
- Service client needs and requirements as determined through client interaction.
- Communicate proactively with clients.
- Promote the firm's wealth enhancement and retirement planning services.
- Promote established investment models and strategies that are suitable and appropriate for our clients.
- Adhere to all company and industry supervisory guidelines and policies.
- Participate in required meetings, training, and continuing education requirements.
- Follow up on firm-generated leads and in developing new client relationships when ready.
- Perform other duties as assigned.

Other Background and Personality Traits:
- Hard working and self-motivated.
- Upholding honesty, INTEGRITY, and trustworthiness.
- Looking for a long-term career, not just a "job".
- Expecting to live in this community long term.
- Possessing an educational background that includes team sports, extracurricular activities, volunteer activities and/or part time jobs strongly preferred.
- Having prior Military Service with Honorable Discharge or other significant life experience strongly preferred.
- Willing to learn, to be mentored, to constantly improve.

We also offer an outstanding working environment in a beautiful and professional office location. This is your chance to play a key role in the continued success of our company. Our culture is fast-paced, motivational, hardworking, and focused on improving our client's lives. For more information about our company, please visit our website at www.mckeonfinancial.com.

If you have a relentless, burning desire to succeed as a financial advisor and share in our vision, then we would love to hear from you! If you're interested in this opportunity, please send your resume and letter of interest to John McKeon at john@mckeonfinancial.com. Questions can be directed to John at 360-652-1411. Given the high demand for this position, we are only able to interview the most qualified candidates. Salary is commensurate with experience. Bonuses are available. Eventually becoming an owner in the company is a possibility.

Respectfully Submitted,
John E. McKeon, President, and Registered Principal
Cheri K. Williams, Treasurer, CFO, and Licensed Administrator