

JOB TITLE:

Financial Advisor

JOB DESCRIPTION:

Interviewing clients to examine their immediate financial situation and long-term financial objectives, and assess clients' sources of income utilizing knowledge of tax and investment strategies, securities, insurance, pension plans, and real estate, to assess liabilities, cash flow, insurance coverage, tax status, and financial objective to establish investment strategies involving clients' goals in financing advanced education; analyzing clients' financial situation and perform variety of financial analysis, such as calculating different financial ratios, conducting cash flow analysis and performing comparative performance analysis; creating comprehensive investment and assets management plans for clients based on their immediate financial need and various long-term goals including investment planning and retirement planning; preparing financial plans for clients and informing clients on options to secure funding for the college education of clients' children; explaining and illustrating numbers and budgets to clients and help clients understand complicated financial and legal documents; modifying initial financial plans to accommodate clients' changing needs and objectives.

JOB REQUIREMENT:

Bachelor's degree in Business Administration, Accounting or Corporate Finance

JOBSITE & INTERVIEW: Santa Clara, CA