



Financial Advisor

Gulf Coast Bank
Lafayette, LA, USA

401K, Dental, Medical, Vision
Full-Time

Why Work Here?

"Great company culture, extensive benefits package, and leadership that truly cares about employees, customers, and the community."

Founded in Abbeville, LA in 1971, **Gulf Coast Bank** is known throughout Acadiana for getting to know our customers personally, and understanding their needs, as well as the needs of the community. **Gulf Coast Bank** has 9 locations across the Acadiana area and employs more than 120 people. As banking has changed through the years, Gulf Coast Bank has stayed on the cutting edge, while never losing sight of what makes our bank special: providing outstanding customer service and maintaining active involvement in the communities we serve.

Position Summary

Gulf Coast Bank is looking for an experienced Financial Advisor based in the Acadiana Area area. The ideal candidate will be an established Financial Advisor who with a history of successfully acquiring, managing, and maintaining a book of business. This is a great opportunity for someone with an entrepreneurial spirit that wants to grow their business and take their career to the next level.

Primary Responsibilities:

- New Business Development: Acquire new customers and continuously build on existing customers:
 - Market services to new and existing clients by engaging in the community, giving seminars, attending business events and conferences and sponsoring community and charitable events.
 - Communicate with other professionals, such as estate agents, lawyers, and valuers to develop reciprocal referral opportunities.
 - Respond to prospective customer queries about financial planning and investments.
- The financial needs of clients are assessed, and a sound financial plan is designed to help them reach their financial objectives:
 - Prepare financial strategy recommendations and make appropriate investment recommendations to current and potential customers based on individualized needs analysis and in-depth review of current financial circumstances and goals.

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- Monitor and analyze clients' accounts, review investment reports, and determine if changes are needed to improve financial performance or to accommodate life changes.
- Manage and update client portfolios by completing a risk analysis for each client and taking measures to adjust portfolios, as necessary.
- Communicate with clients to update on potential investment opportunities, introduce new financial products, and recommend adjustments to the financial plan.
- Prepare and/or interpret financial document summaries, investment performance reports and income projections for clients.
- Monitor market trends and research available investment opportunities to determine suitability or best interest for clients' financial plans.
- Compliance:
 - Meet the fiduciary duty and regulatory aspects of the role.
 - Keep detailed records of the services provided.
 - Maintain thorough knowledge of federal and state laws regarding investments, financial advice, and fees for financial services.

What We Offer:

- Competitive Compensation Structure
- Full Medical, Dental, Vision
- Paid Vacation/Sick Leave/Holidays
- Support and overhead are paid by Gulf Coast Bank.
- The opportunity to find new clients through assigned branches' client base and referrals.

Requirements:

- Bachelor's degree preferably in Business, Finance, Accounting, or related field.
- 5+ years of sales experience. 3+ years of related experience in investment sales, Brokerage/Insurance and/or Banking/Retail.
- Must currently possess Life, Health and Accident Insurance Licenses – fixed annuity and variable annuity and be in good standing.
- Must currently possess FINRA Investment License(s) – Series 7 and Series 66, or Series 7 with Series 63 and 65 and be in good standing.

We are an equal opportunity employer and value diversity at our company. We do not discriminate on the basis of race, religion, color, national origin, gender, sexual orientation, age, marital status, veteran status, or disability

status.



About Gulf Coast Bank:

Our mission is to deliver high-quality customer service that meets the financial needs of our community, its businesses, and its citizens.

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Company website: <https://www.gcbank.com/>

Company address: 3911 Ambassador Caffery Pkwy, Lafayette, LA 70503

Posted date: 13 days ago

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