

# Money Advisor – Workplace Financial Educator

Are you an educator or financial advisor with a passion for helping others? If so, we want to talk with you!

Francis Investment Counsel is seeking an experienced educator/financial advisor residing in the Minneapolis area to serve as a money coach, helping workers become better family financial managers without the sales pitch.

Francis Investment Counsel, through its brand MoneyAdvice@Work<sup>®</sup>, provides financial wellness programs and personal money advice within the workplace, delivering services onsite, on the go, and on demand. We think the traditional wealth management business is too focused on the wealthy. Francis Investment Counsel delivers the money advice American workers desperately need through an employer-sponsored financial wellness benefit.

And best of all, no sales pitch is required.

Our ideal candidate has a passion for teaching, is understanding and empathic, willing to work hard, and derives deep satisfaction for helping others improve their financial lives.

Here's what you'll do:

- Develop creative and practical adult financial wellness curriculum
- Provide on-site and web-based financial education for U.S. workers
- Advise workers on all money matters including investment advice
- Ensure that our customers love us
- Create regular reports which document education and advice activities
- Stay in the know with financial and retirement planning matters
- Treat everyone you encounter with kindness and respect
- Work collaboratively with a team planning programs and training
- Travel to client locations to provide onsite services and consultation. Some after-hours travel may be required.

Qualifications include:

- Bachelor's degree, preferably in a business, financial or education field.
- A Series 65, Certified Financial Planner (CFP) or other similar industry designation with experience in the financial planning industry, adult education, and/or human resources field is preferred. The gift of teaching and a passion for helping others are required.
- Due to serving diverse groups of employees, fluency in additional languages is a plus.
- Strong presentation skills.
- Excellent communication and customer service skills (written and verbal).
- Great attention to detail and organization.

This is a unique opportunity to join the Francis team as a full-time salaried coworker enjoying a generous benefit package, including a sabbatical program, and collaborative work environment.

## Who We Are

Francis Investment Counsel LLC is a nationally recognized and award-winning institutional investment consulting organization with offices in Brookfield, WI, and Minneapolis, MN. We provide investment consulting and participant education and advisory services to qualified retirement plan sponsors and their participants. As an independent Registered Investment Advisor with no broker/dealer affiliations, Francis Investment Counsel does not sell investment products nor receive compensation from the organizations or investment product we recommend. Francis Investment Counsel currently consults to over \$11 billion in customer assets.

## Application

Send resume to Susan Salmon, Director of Operations at [susan.salmon@francisinvco.com](mailto:susan.salmon@francisinvco.com).

The above statement reflects the general details necessary to perform the principal functions of the position described and shall not be construed as a detailed description of all the work requirements that may be inherent during your employment.