



Where you stand.®

## Join Our Team

### Current Available Positions:

Financial Planning Associate

Client Service Associate

Internship/Professional Residency

### Additional Availability For:

Succession & Continuity Planning for Investment Advisors

Breakaway Brokers

# Financial Planning Associate



Where you stand.®

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.

Those interested should click the link below and complete each step of the application process: <https://go.apply.ci/s/2A0E060000>

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.

# Client Service Associate



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 should have an Associates Degree (or equivalent office-related work experience). 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: <https://portal.cultureindex.com/public/survey/general/2A0E06>

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# Internship/ Professional Residency



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.

Those interested should click the link below and complete each step of the application process: <https://go.apply.ci/s/2A0E060000>

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# Succession & Continuity Planning for Investment Advisors



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.