

Join Our Team



*Midwest Financial Group is a values-based financial planning and employee benefits firm with locations in Madison, Platteville, and Horicon, WI and **we're growing!***

Lead Advisor (Full-Time)

Madison, WI

We are looking for an individual with a proven start in the financial services industry already, that would like to make the jump to the next level in their career and taking advantage of the systems, support, processes, personnel and already existing client base that our firm has to offer.

This is an amazing opportunity for someone who may be looking to move to the independent channel of our industry, or someone that has hit their personal development ceiling by themselves and could benefit from being part of a great organization and bigger team.

We want to help a good advisor become a great advisor. We are looking for someone that would like to improve upon what they are already doing by partnering with an already successful firm, and in the process have more personal and financial success, as well as more time freedom, and a better work/life balance.

Expectations:

- Develop & grow new client relationships, along with service pre-existing clients of the firm
- Help clients define and reach their financial goals through comprehensive planning and wealth management
- Prepare and present financial plans using established design and structure
- Follow up with client requests, reviews, and service needs as applicable
- Drip market using existing methods to a growing list of prospects
- Prepare and deliver educations presentations for employer groups and at public venues

Requirements:

- Ability to become licensed and appointed with Commonwealth Financial Network
- Self-motivation and accountability
- Strong desire to be part of a team, yet work independently and be self-motivated
- Desire to put the needs of the client first
- Honest, Loyal, Ethical, and Accountable
- Someone with a pre-existing client base not under a 'do not compete' would be ideal

Why Should You Work for Midwest Financial Group?

- You'll love the camaraderie here!
- Work-Life balance is excellent.
- Midwest Financial Group makes decisions with you in mind and not the bottom line.
- You'll be working for a company that treats their employees as well as customers just like family.
- You'll be helping clients make a difference in their lifestyles and their legacy.
- Full-time positions receive comprehensive benefits.

To apply, email your resume and cover letter to:

mailbox@midwestfinancialgroup.net

Or mail them to:

Midwest Financial Group

1806 Seminole Hwy.

Madison, WI 53711

608-807-4775

Start your career with us today.

*Securities and advisory services offered through Commonwealth Financial Network®, member FINRA/SIPC, a Registered Investment Adviser.