HTG INVESTMENT ADVISORS INC.

50 Locust Avenue
New Canaan, CT

Financial Advisor

HTG Investment Advisors Inc. (HTG) is an independent fee-only wealth management firm. Founded in 1993, HTG is a SEC Registered Investment Advisor serving over 300 families and managing over $900 million in assets.

HTG's mission is to help individuals and families achieve their financial goals by understanding their unique family and financial circumstances and create a customized plan to meet their objectives through a blend of financial planning and investment management.

HTG is seeking a professional who will join our team of fourteen to work with clients and colleagues in providing outstanding advice and service to our clients.

Responsibilities

- Manages existing client relationships, as the client's primary advisor or working in partnership with a more experienced advisor. Provides financial and investment advice across a number of disciplines including investments, portfolio planning, retirement, tax, insurance and estate planning. Identifies clients' goals and implements appropriate portfolios based on firm guidance. Pro-actively communicates financial planning opportunities and investment performance to clients and responds promptly to all client requests.

- Participates in business development by meeting with prospects, identifying their needs and explaining the firm's capabilities.

- Increases awareness of the firm by writing blogs, speaking publicly, building relationships with other professional firms, and engaging in community activities.

- Leads or participates in firm wide activities and projects, usually on a rotational basis. These may include marketing, compliance, events or technology.

Skill Sets / Qualifications -

Financial services:

- Analytical, organized and detail- oriented. Very comfortable working with numbers, spreadsheets and analyzing data.
- Well-rounded knowledge of financial markets and investments particularly with respect to investment vehicles, asset allocation and portfolio construction.
- Familiar with personal finance concepts with respect to taxes, investments, insurance, and retirement vehicles.

Client service and teamwork:

- Ability to develop trust, convey professional presence and provide thoughtful advice to high-net-worth clients.
- Ability to work independently, yet collaboratively with all team members.
- Strong communication and interpersonal skills including writing, listening, empathy, and emotional intelligence.

Technology:

- Familiar with cloud-based computing environments, CRMs and portfolio management systems. Able to learn software applications quickly and become proficient.
- Deep understanding of Microsoft Excel and Word. Familiarity with Morningstar and database systems a plus.

Qualifications and Experience

- 3-7 years of relevant experience in financial services. Experience providing advice to individual clients at a financial services firm a plus.
- College degree required. Having or pursuing an MBA or professional designations such as a CFP or CFA a plus.

Career and other interests

- Desire to work in a small, entrepreneurial firm.
- Interested in a long-term working relationship. Flexible work hours available and an initial start as part-time open for discussion.
- Demonstrated interest in the financial planning / investment advisory profession.

Compensation and Benefits

- Competitive salary and bonus commensurate with experience.
- Compensation not tied to client acquisition.
- Safe Harbor 401(k) plan with discretionary profit sharing.
- Annual vacation of 17 days plus federal holidays.
- Subsidized group health insurance.
- Opportunities for professional growth and continuing education reimbursement