

WADDELL & REED, Inc.

Company Overview:

Waddell & Reed, Inc., formed in 1937, is one of the most enduring broker/dealers in the United States. We offer advisors an environment which seeks to combine the philosophical and practice flexibility of an independent model with the support and resource infrastructure of a full-service firm. Our Classic advisors emphasize comprehensive financial planning and work in a direct-to-fund environment. Our Choice advisors, utilizing the brokerage platform of Pershing, LLC, work in an open-architecture environment providing a comprehensive array of products and fee-based structures. Advisors from both operating environments can qualify for stock of our public company and enjoy highly competitive compensation structures within the practice model that they select, with payouts ranging from 60% to 90%. In a commoditized broker/dealer world, we believe we offer a uniquely flexible and supportive structure that provides advisors, and their clients, the opportunity to optimize their success.

Job Description:

At Waddell & Reed, we invest in our financial advisors. As you consider your options, we want you to know that Waddell & Reed not only offers unparalleled opportunity, but we do so with a level of personal support that sets us apart.

Responsibilities:

As a financial advisor, you will provide your clients with comprehensive financial planning and advice to help them effectively pursue their financial goals.

- Target prospective clients and market your unique value proposition in your community.
- Evaluate your client's financial situation and identify investment objectives through a comprehensive and customized financial planning process.
- Recommend appropriate solutions and monitor portfolios for economic changes and adjustments in your client's needs and objectives.
- Actively participate in training and development curriculum to continually improve your marketing and financial planning skills and knowledge base.
- Provide personal client service and support.

Job Requirements:

Depending on your background, experience, career and personal goals – we have three targeted career tracks. Within each track, we are looking for candidates with a demonstrated pattern of success.

Classic Advisor:

Career changer: Accounting, Business Development/Ownership, Mortgage Brokerage, Sales, marketing, Education, Law, Operations/Management, Technical, Military, Health Care, etc.

New College Graduate: Financial Planning, Finance, Marketing, Business, Accounting, Public Relations, Communication, Educations, etc.

Choice Advisor:

Experienced Financial Services Professional: Financial Planning, Brokerage, Banking, Insurance, and Wealth Management.
