



# BLUEPRINT

Planning #ReIMAGINED

## BLUEPRINT ADVISOR

### Career Overview:

We're looking to expand our team of forward-thinking Advisors who desire to pursue a meaningful career impacting the financial outcomes of others. You will actively seek to bring on new members by applying your communication and problem-solving skills to deliver financial guidance and coaching to the young professionals and entrepreneurs in our community.

### What does a successful candidate look like?

As a Financial Advisor with Blueprint you will leverage your network in a modern, urban work environment located in the Cedar Hill building near Bank of America stadium in Uptown Charlotte. You will actively develop a practice that seeks to provide financial planning services to young professionals, entrepreneurs, and their growing families. You will guide them through a process that delivers planning done in an approachable, relaxed, judgement-free zone where open communication is encouraged.

Looking for continuous professional development opportunities, an innovative team of like-minded peers, compensation directly proportional to your efforts, and work-life balance? We'd love for you to explore becoming a Financial Advisor with [Blueprint](#).

### REQUIREMENTS:

- 2 to 5+ years of relationship-based sales, entrepreneurial, or related experience
- Aspires to build and grow a planning practice
- Desires to be client-facing (as opposed to back office support of clients)
- Willingness to create and nurture new client activity
- Ability to obtain all required securities & insurance licenses within 90 days
- Team-oriented, coachable, honest and ethical
- Displays business maturity
- Strong social network: History of volunteering and/or affiliations with non-profit groups, networking groups, alumni associations, etc.

### Bonus points for:

- Activity-driven success at prior firm
- Series 7, 66, (or 63/65) and/or Life & Health licenses --- CFP® or equivalent designation
- Previous financial planning experience with young professionals and entrepreneurs or experience as a business owner

### Ready to take the first step in redefining your career?

Visit us at:

[www.planwithblueprint.com/careers](http://www.planwithblueprint.com/careers)

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