

For information on becoming a *Personal Financial Advisor* see **Sources of additional information** within this brochure.

For information on youth employment opportunities, contact a career counselor at your high school or employment counselor or job and information center coordinator at your local NH Employment Security Office.

Berlin (752-5500)

151 Pleasant Street, P.O. Box 159, 03570-0159

Claremont (543-3111)

404 Washington Street, P.O. Box 180, 03743-0180

Concord (228-4100)

10 West Street, P.O. Box 1140, 03302-1140

Conway (447-5924)

518 White Mountain Highway, 03818-4205

Keene (352-1904)

109 Key Road, 03431-3926

Laconia (524-3960)

426 Union Avenue, Suite 3, 03246-2894

Lebanon (448-6340)

85 Mechanic Street, 03766-1506

Littleton (444-2971)

646 Union Street, Suite 100, 03561-5314

Manchester (627-7841)

300 Hanover Street, 03104-4957

Nashua (882-5177)

6 Townsend West, 03063-1217

Portsmouth (436-3702)

2000 Lafayette Road, 03801-5673

Salem (893-9185)

29 South Broadway, 03079-3026

Somersworth (742-3600)

6 Marsh Brook Drive, 03878-1595



For more information on this series of brochures, or to find out about our other products, contact us at:

New Hampshire Employment Security
Economic and Labor Market Information Bureau
32 South Main Street, Concord, NH 03301-4857
Phone: (603) 228-4124, E-mail: elmi@nhes.nh.gov, Web site: www.nh.gov/nhes/elmi

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So, you want to be a ...



Personal Financial Advisor

Business, Management, & Administration

Projected to be among the fastest growing occupations
(New Hampshire Occupational Projections, 2006-2016)

Here are a few things you should know.



Your gateway to New Hampshire workforce and career information



You'll want to know a few things about this career

Average Hourly Wage

\$37.12

Expected 10 year Growth

43%

Average Annual Openings

40

Training/Education Needed

Bachelor's Degree or Military Training

Basic Skills

Reading, listening, writing, speaking, math

Job Skills

Mathematical, computer, analytical, and problem-solving skills are essential qualifications. Good communication skills are also necessary. Self-confidence, maturity, and the ability to work independently are important as well. Must be detail oriented, motivated to seek out obscure information, and familiar with the workings of the economy, tax laws, and money markets. Strong interpersonal skills and sales ability are crucial to the success of personal financial advisors.

So, you want to be a ...



Personal Financial Advisor

Projected to be among the fastest growing occupation (New Hampshire Occupational Projections, 2006-2016)

Tasks

Source: O*Net Online

1. Sell financial products such as stocks, bonds, mutual funds, and insurance if licensed to do so.
2. Build and maintain client bases, keeping current client plans up-to-date and recruiting new clients on an ongoing basis.
3. Analyze financial information obtained from clients to determine strategies for meeting clients' financial objectives.
4. Answer clients' questions about the purposes and details of financial plans and strategies.
5. Review clients' accounts and plans regularly to determine whether life changes, economic changes, or financial performance indicate a need for plan reassessment.
6. Interview clients to determine their current income, expenses, insurance coverage, tax status, financial objectives, risk tolerance, and other information needed to develop a financial plan.
7. Recommend strategies clients can use to achieve their financial goals and objectives, including specific recommendations in such areas as cash management, insurance coverage, and investment planning.
8. Implement financial planning recommendations, or refer clients to someone who can assist them with plan implementation.
9. Research and Investigate available investment opportunities to determine whether they fit into financial plans.
10. Explain and document for clients the types of services that are to be provided, and the responsibilities to be taken by the personal financial advisor.

Interests (Holland Code)

ECS

(Enterprising, Conventional, Social)

Career Cluster

Finance

Working Conditions

Pleasant and comfortable clean, well lit offices, frequent travel

Average Work Week

At least 40 hours (May face long hours, frequent travel, and pressure of deadlines.)

Sources of Additional Information

NH Employment Security (Contact office nearest you or go online to www.nh.gov/nhes)

Certified Financial Planner Board of Standards, Inc. 1670 Broadway, Suite 600 Denver, CO 80202-4809 www.cfp.net/become

The American College 270 South Bryn Mawr Ave Bryn Mawr, PA 19010 www.theamericancollege.edu