

MIGHTY OAK STRONG AMERICA INVESTMENT COMPANY
940 CENTURY DRIVE
MECHANICSBURG, PA 17055
INVESTWITHMOSAIC.com

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Registered Investment Advisor

Available: Immediately
Company: Mighty Oak Strong America Investment Company
Contact: Don DeMuth, 940 Century Drive, Suite B, Mechanicsburg, PA 17055
Phone: 717-790-9001
Email: ddemuth@investwithmosaic.com
Website: INVESTWITHMOSAIC.com
Preferred method of contact: Email

MOSAIC is a rapidly growing fee-only Registered Investment Advisor, which provides clients with comprehensive investment management and financial planning services in suburban Harrisburg, Pennsylvania. Visit our website, INVESTWITHMOSAIC.com, for more information about the firm.

Responsibilities include:

1. Preparation of comprehensive financial plans including obtaining information from clients, analyzing existing investments and recommending any changes, retirement projections, income and estate tax planning, insurance policy analysis, and education funding.
2. Meet with clients to discuss implementation of the financial planning recommendations and addressing their other issues and concerns.
3. Manage client portfolios including research regarding existing and desirable investments and making investment trades.
4. Open new accounts and monitor portfolios adhering to clients' Investment Policy Statements.
5. For the firm to continue to grow, Registered Investment Advisors need to attract new clients, with more business development expected of the Registered Investment Advisor over time.

Qualifications:

The candidate should be a CFA charterholder, CPA with the Personal Financial Specialist designation, Certified Financial Planner, or Attorney with appropriate financial planning background.

Preferably the candidate has an MBA with a concentration in Investments or Financial Planning, is a Chartered Financial Analyst charterholder or candidate, and is a CPA. Since half to three-quarters of the time the RIA will be preparing financial plans of 40–100 pages cogent written and verbal communication skills are needed. The candidate should be comfortable discussing financial plans with individual clients and in public speaking to develop new clients. We recognize that not all candidates may have all the preferred qualifications and those who do not possess all the desired qualifications are invited to apply.

We offer:

1. Salary and bonus commensurate with education, training, and experience
2. Family medical insurance
3. 401(k) profit sharing plan with a match up to 4% plus discretionary profit sharing plan contribution (6% in 2019)
4. Continuing education allowance
5. Paid vacation and holidays

Interested candidates should direct their resumes and cover letters to ddemuth@investwithmosaic.com. This information is confidential and all candidates will receive a response regarding discussing the position.