



Financial Advisor and Business Succession Partner

Established, successful independent financial planning and wealth management firm with offices in PA and NJ seeks experienced financial advisor with existing book of business to join us in our Bucks County office located in the historic Doylestown Borough. The ideal candidate will become part of our business succession plan for a senior partner eventually leading to a partnership opportunity.

We offer exceptional administrative and operational support as well as great office space and private parking. Join our team and bring your ideas for marketing and prospecting initiatives to grow your business. Consider the possibilities, including the potential for higher production and payout through the independent channel. FINRA Series 7, 63 and 65 or 66 required; CFP[®] or CFP[®] candidate desirable. Existing book of clients required.

Please contact Bud James, Dynasty Advisors, LLC, at 866-284-1314 or email resume to bjames@dynastyadvisors.com.