



## POSITION DESCRIPTION INVESTMENT ADVISORY SPECIALIST

United Planners is a national wealth management firm that provides financial planning, investment management and insurance services. Established in 1987, United Planners is proud of its true independence and its stance of being “**Adamantly Not For Sale**” because it is 100% owned by its employees and financial professionals. United Planners provides back-office support to independent financial professionals, who then help investors manage their wealth to achieve a variety of goals & objectives. United Planners is uniquely structured as a limited partnership that offers ownership opportunities and profit sharing to its employees and financial professionals. We embrace a culture, passion and strategy that caters to the fiercely independent financial services community. United Planners is an open-architecture model that offers flexible, efficient and scalable solutions to position its financial professionals to build and manage profitable businesses. United Planners is Registered Broker-Dealer with the Financial Industry Regulatory Authority (FINRA) / Registered Investment Advisor with the Securities & Exchange Commission (SEC) / Member of the Securities Investor Protection Corporation (SIPC).

United Planners is currently seeking a qualified professional to join our Advisor Services Department in Scottsdale Arizona as an **Investment Advisory Specialist** in Investment Advisory Services. This qualified professional will be a critical team member

7333 E. DOUBLETREE RANCH ROAD, SUITE 120, SCOTTSDALE, AZ 85258  
TEL: 480.991.0225 / FAX: 480.503.8173 / U