- Senior Advisor Candidate Alert
- Pewaukee, WI (Is not mobile)
- Manages \$200M AUM
- 12 years of experience in financial services
- Holds (B.S) Bachelor of Science Communication, University of Wisconsin, Milwaukee, WI CFP -Certifi...
- Holds CFP, Series 6
- Core expertise: Investment & Asset Management, Strategic and Tactical Asset Allocation, Analysis

- Advisor Candidate Alert
- Las Vegas, Nevada, United States (Is not mobile)
- 7 years of experience in financial services
- 8 years of experience in financial services
- Holds Series 66, , CFP, Series 7,
- Serves 200 clients/families
- Available 1 month ideally, 2 week if necessary; desired comp 170-180k total compensation

Ref code: TWAV584047

- Advisor Candidate Alert
- Los Angeles, California, United States (Is not mobile)
- 15 years of experience in financial services
- 20 years of experience in financial services
- Holds Series 66, , CFP, Series 7,
- Serves 300 clients/families
- Available asap; desired comp \$100k+

- !! Advisor Candidate Alert ____
- Greater Phoenix Area (Is not mobile)
- 9 years of experience in financial services
- Holds Series 7, 66, and life and health

- Holds Series 66,
- focused on holistic financial planning
- Core expertise: Wealth Management Services, Portfolio Management, Microsoft

- Advisor Candidate Alert
- **San Diego, CA** (Is not mobile)
- 3 years of experience in financial services
- Holds Testing in August for Series 65
- Holds Series 65
- focused RIA managing
- Available Immediately; desired comp \$90k before bonus

Ref code: TWAV982394

- ! Advisor Candidate Alert _
- Parkley, CA (Is not mobile)
- 6 years of experience in financial services
- Holds Series 7
- focused on onboarding flows for financial advice clients
- Available Available Immediately; desired comp \$160k to \$200k

Ref code: TWAV166204

- !! Advisor Candidate Alert ____
- Seattle, Washington, United States (Is not mobile)
- Manages \$30M AUM
- 20 years of experience in financial services
- Holds NONE
- Serves 60 clients/families
- focused on bringing in assets and rollovers

- !! Advisor Candidate Alert ____
- Panville, CA (Is not mobile)
- 25 years of experience in financial services

- Holds Series 65
- expert witness in ERISA
- Core expertise: authority, fiduciary, retirement transit
- Currently at The Well Recruiting Solutions

- Advisor Candidate Alert
- The Woodlands, Texas (Is not mobile)
- Manages \$50M AUM
- 18 years of experience in financial services
- Holds CRPC
- Holds Series 7
- focusing on comprehensive financial planning for insurance clients

Ref code: TWAV048036

- !! Advisor Candidate Alert ____
- Waxhaw, North Carolina, United States (Is not mobile)
- Manages \$5M AUM
- 3 years of experience in financial services
- Holds EA, CFP exam passed working on completing hours
- Holds Series 65, CFP
- Core expertise: Business Exit Planning, Equity Compensation Planning, Pe

Ref code: TWAV295004

- !! Advisor Candidate Alert _____
- Seattle, Washington, United States (Is not mobile)
- Manages \$100M AUM
- 16 years of experience in financial services
- Holds finishing CFA, took level 1 and 2, needs to finish
- Holds Series 65, CFA
- Core expertise: Mutual Funds, Morningstar, Financial Analysis

- 📕 Advisor Candidate Alert 🔔
 - Central Valley (Is not mobile)
 - Manages \$2M AUM
- 7 years of experience in financial services
- Holds Series 65 and life
- Manages \$1M AUM
- Serves 400 clients/families

- Advisor Candidate Alert
- San Jose, California, United States (Is not mobile)
- 7 years of experience in financial services
- Holds CFP candidate (passed exam; board approval pending)
- Manages \$1B AUM
- Serves 20 clients/families
- Core expertise: Google Workspace, Building Performance, Crisis Co

Ref code: TWAV006003

- Senior Advisor Candidate Alert
- Maple Valley, Washington, United States (Is not mobile)
- Manages \$5M AUM
- 3 years of experience in financial services
- Holds CFP, CDSA
- 10 years of experience in financial services
- focused on holistic

- Advisor Candidate Alert
- Pasehor, Kansas, United States (Is not mobile)
- 10 years of experience in financial services
- Holds CFP (sitting for exam Nov 2025)
- Holds CFP, Series 7
- Serves 600 clients/families
- focused financial advisory experience

- Advisor Candidate Alert
- New Albany, Ohio, United States (Is not mobile)
- 5 years of experience in financial services
- Holds NMLS, Limited Lines
- Holds CFP, Series , CFA
- focused on retirement and long
- Core expertise: Time Management, Microsoft Outlook

Ref code: TWAV583001

- Advisor Candidate Alert
- Indianapolis, IN (Is not mobile)
- 3 years of experience in financial services
- Holds Series 66/7 and Life and Health
- Holds Series 66, , Series 7,
- Serves 24 clients/families
- focused financial planning

Ref code: TWAV616290

- Advisor Candidate Alert
- Parallel Boulder, Colorado, Estados Unidos (Is not mobile)
- 10 years of experience in financial services
- Holds Series 7, 66, , CFA
- Core expertise: Financial Analysis, Business Analysis, English
- Currently at Equitable Advisors
- Available Immediately; desired comp \$150,000 \$200,000

- !! Advisor Candidate Alert _____
- Houston, TX (Is not mobile)
- 25 years of experience in financial services
- Holds NONE
- Manages \$125B AUM

- focused cultures and embraces the role of operations as a strategic
- Core expertise: data management, risk mitigation, process imp

- !! Advisor Candidate Alert ____
- Huntersville, North Carolina, United States (Is not mobile)
- 20 years of experience in financial services
- Manages \$75M AUM
- Manages \$125M AUM
- Holds CFP, Series 7, 63, 65,
- Available Immediately; desired comp \$125k \$150k OTE Year 1

Ref code: TWAV301001

- Advisor Candidate Alert
- Allison Park, Pennsylvania, United States (Is not mobile)
- 15 years of experience in financial services
- Holds Series 6, 7, 63, 66, SIE, PA Life, Accident & Health
- Core expertise: Constructive Feedback, Relationship Building, Financial Pl
- Currently at CUSO Financial Services
- Financial Advisor, CUSO Financial Services, LP at Clearview Wealth Management Group

Ref code: TWAV963023

- Advisor Candidate Alert
- Vero Beach, Florida, United States (Is not mobile)
- 15 years of experience in financial services
- Holds Series 7, Series 6, Series 66, Life & Health
- Holds Series 7, 6, 66,
- Core expertise: Leadership, Relationship Management, Time Management
- Currently at Merrill Lynch

- 📕 Advisor Candidate Alert 🔔
- San Antonio, Texas, United States (Is not mobile)
- 20 years of experience in financial services

- Holds Series 7, 63, 65, 24
- expertise in high
- Core expertise: Retirement Savings, Voice Acting, Negotiation
- Currently at Victory Capital

- Advisor Candidate Alert
- San Marcos, California, United States (Is not mobile)
- 6 years of experience in financial services
- Holds NSSA
- Manages \$120M AUM
- Manages \$11M AUM
- Holds Series 65

Ref code: TWAV061722

- Advisor Candidate Alert
- Redondo Beach, California, United States (Is not mobile)
- 9 years of experience in financial services
- Holds APMA
- Holds Series 7, 63, 65,
- Serves 260 clients/families
- Core expertise: Investment Advisory Services, Asset Management, V

Ref code: TWAV405373

- !! Advisor Candidate Alert _____
- Orlando, FL (Is not mobile)
- 25 years of experience in financial services
- Holds Paralegal
- expertise in financial services
- Currently at Charles Schwab
- Available Immediately; desired comp \$125,000 base

- !! Advisor Candidate Alert ____
 - Phoenix, AZ 85260 (Is not mobile)
- 4 years of experience in financial services
- Holds SE-AWMA
- 20 years of experience in financial services
- 5 years of experience in financial services
- focused on building trust by listening and uncovering what truly matters to each client

- Advisor Candidate Alert
- Surprise, Arizona, United States (Is not mobile)
- Manages \$60M AUM
- 11 years of experience in financial services
- Holds NONE, willing to obtain CFP
- Holds Series 65,
- focused on wealth

Ref code: TWAV867975

- Advisor Candidate Alert
- P New York City Metropolitan Area (Is not mobile)
- 4 years of experience in financial services
- Holds CFP in progress
- Holds Series 7, , CFP, Series 66, , CLU, ChFC
- Serves 85 clients/families
- focused on retirement planning

- Advisor Candidate Alert
- Maitland, Florida, United States (Is not mobile)
- 1 years of experience in financial services
- Holds Series 7, 63, 65
- Holds Series 7, 63, , CFP, CFA
- Core expertise: Series 7, Series 63, Data Analysis
- Currently at Robinhood

- Advisor Candidate Alert
- Los Angeles, California, United States (Is not mobile)
- 4 years of experience in financial services
- Holds Series 6, 7, , CFP, Series 65,
- Serves 80 clients/families
- focused on engaging the next generation of wealth transfer clients
- Available 2 weeks after offer; desired comp 70k Base + Commission

Ref code: TWAV821027

- !! Advisor Candidate Alert ____
- Greater Chicago Area (Is not mobile)
- 20 years of experience in financial services
- Holds Chartered Retirement Planning Counselor (CRPC)
- Manages \$45M AUM
- Holds Series 66, , Series 7, , CFP
- Serves 400 clients/families

Ref code: TWAV869047

- Advisor Candidate Alert
- Minneapolis, Minnesota, United States (Is not mobile)
- 17 years of experience in financial services
- Holds RICP, BFA, CRPC, SEMA (in progress)
- Manages \$2B AUM
- Holds Series 6, 7, 63, 66,
- expertise to help individuals and teams achieve their goals

- !! Advisor Candidate Alert ____
- Milwaukee, Wisconsin, United States (Is not mobile)
- 8 years of experience in financial services
- Holds Series 7, 63, 65
- focusing on national account distribution

- Core expertise: Series 65, Series 7, Series 63
- Currently at Heartland Advisors, Inc.

- !! Advisor Candidate Alert ____
- Los Angeles, California, United States (Is not mobile)
- 9 years of experience in financial services
- Holds Getting CFP (ETA 2026)
- Holds Series 66, , Series 7, , CFP
- specialized in deepening relationships
- Core expertise: Insurance, Tableau, Salesforce CRM Analytics

Ref code: TWAV912001

- Advisor Candidate Alert
- Houston, TX (Is not mobile)
- 8 years of experience in financial services
- Holds Chartered Retirement Planning Counselor (CRPC)
- 17 years of experience in financial services
- Holds Series 6, 63, 65,
- Currently at Retirement Planners of America

Ref code: TWAV921499

- !! Advisor Candidate Alert ____
- St Louis, Missouri, United States (Is not mobile)
- 17 years of experience in financial services
- Manages \$3M AUM
- Holds Series 7, 66, , Series 65, CFA
- Core expertise: Multi-Family Properties, Portfolio Management, Alternative Inve
- Available Two Weeks notice; desired comp \$200k OTE

- Senior Advisor Candidate Alert
- Hartford, Connecticut, United States (Is not mobile)
- 12 years of experience in financial services

- Holds Pursuing SEMA
- Holds Series 6, 63, 7, 66,
- focused on asset gathering
- Core expertise: Estate Planning, Investment Management, Portfolio Man

- Advisor Candidate Alert
- Paytona Beach, Florida, United States (Is not mobile)
- 12 years of experience in financial services
- Holds CFP, CLU, ChFC, BFA
- Holds ChFC, CFP, Series 7, 6, 63, , CLU
- Core expertise: CFP, ChFC, CLU, BFA
- Currently at Ameriprise Financial Services, LLC

Ref code: TWAV381109

- Advisor Candidate Alert
- Los Angeles, California, United States (Is not mobile)
- 7 years of experience in financial services
- Holds AWMA, AAMS, CFP Candidate
- Holds Series 6, 63, , CFP
- Core expertise: Administrative Assistance, Financial Services, Research Skills
- Currently at Manhattan West

Ref code: TWAV383001

- !! Advisor Candidate Alert _____
- Gig Harbor, WA (Is not mobile)
- 7 years of experience in financial services
- Holds Level 1 CFA
- Holds Series 7, CFA
- Serves 400 clients/families
- Core expertise: Accounting & Budget Reconciliation, Y- Charts, Mo

- Senior Advisor Candidate Alert
 - Seattle, Washington 98106 (Is not mobile)
 - 3 years of experience in financial services
 - Holds NONE, open to CFP
 - 12 years of experience in financial services
 - Holds Series 66
 - Serves 50 clients/families

- Advisor Candidate Alert
- Paremerton, WA (Is not mobile)
- 9 years of experience in financial services
- Holds NONE
- Manages \$12M AUM
- expertise was further leveraged when he stepped away to assist in modernizing and optimizing his family business
- Core expertise: sales, sales management, marketing, strategic pla

Ref code: TWAV568001

- Advisor Candidate Alert
- Scottsdale, AZ (Is not mobile)
- 10 years of experience in financial services
- Holds WMCP, Currently in process of CFP (Expected in Feb '26)
- Holds WMCP, Series 7, CFP
- expertise with a highly personal
- Core expertise: Bilingual, Client Facing, Annuities, Managed Money, Software, Relationship Building

- !! Advisor Candidate Alert ____
- West Hollywood, California, United States (Is not mobile)
- 8 years of experience in financial services
- Holds CFP, Series 7, 9, 10, 66, 63, SIE
- Holds CFP, Series 7, 63, 66, 9, , Series 9
- Serves 130 clients/families

• focused on moving clients into advisory relationships and increasing assets under management

Ref code: TWAV939023

- Advisor Candidate Alert
- Ojai, California, United States (Is not mobile)
- 16 years of experience in financial services
- Holds Series 65
- Manages \$50M AUM
- focusing on transparency
- Core expertise: Family Wealth Management, Environmental, Social,

Ref code: TWAV945001

- Advisor Candidate Alert
- Fast Valley, AZ (Is not mobile)
- Manages \$114M AUM
- 5 years of experience in financial services
- Holds CFP, Series 7
- Serves 160 clients/families
- Currently at Vanguard

Ref code: TWAV985001

- !! Advisor Candidate Alert ____
- Nashville, TN 37201 (Is not mobile)
- Manages \$45M AUM
- 5 years of experience in financial services
- Holds Pursuing CFA. Open to CFP.
- Core expertise: Excel, Python, Bloomberg, Factset
- Currently at Sage Rhino Capital LLC

- Advisor Candidate Alert
- Homestead, Florida, United States (Is not mobile)
- 1 years of experience in financial services
- Holds Series 65, Health/Life/Variable Annuity

- 4 years of experience in financial services
- Holds CFP, Series 65,
- focused on planning

- Advisor Candidate Alert
- Greater Chicago Area (Is not mobile)
- 22 years of experience in financial services
- Holds Series 6, 7, 63, 65, 24 and Insurance (life; original entry license)
- Serves 25 clients/families
- Core expertise: Insurance, Retirement Planning, Fixed Annuities
- Currently at Fidelity Investments

Ref code: TWAV858002

- !! Advisor Candidate Alert ____
- Sussex, Wisconsin, United States (Is not mobile)
- 25 years of experience in financial services
- Holds Series 6, 63, 65, Life & Health
- expertise in annuities while rebuilding client trust and retention during a period of high turnover
- Core expertise: Financial Planning and Analysis, Independent Finan
- Currently at Chase

Ref code: TWAV139001

- !! Advisor Candidate Alert ____
- Los Angeles, California, United States (Is not mobile)
- 3 years of experience in financial services
- Holds Series 7 and 66
- Currently at Charles Schwab
- Available ASAP; desired comp 85+ Commission, wants to discuss.

- 📙 Advisor Candidate Alert 🔔
- Las Vegas, Nevada, United States (Is not mobile)
- 9 years of experience in financial services

- Holds CFP, APMA (Accredited Portfolio Management Advisor)
- Holds Series 66, , Series 7,
- Serves 105 clients/families
- focus on comprehensive planning

- Advisor Candidate Alert
- Fremont, California, United States (Is not mobile)
- 18 years of experience in financial services
- 20 years of experience in financial services
- 15 years of experience in financial services
- Core expertise: Slack, Firm360, Land Value Increment Tax
- Available 2 weeks after offer; desired comp 110k base

Ref code: TWAV627001

- Advisor Candidate Alert
- San Francisco Bay Area (Is not mobile)
- 4 years of experience in financial services
- Core expertise: Finance, Analysis, Estate Planning
- Currently at Osaic
- Providing solutions for financial health
- Available ASAP; desired comp 110k, might have some flex here.

Ref code: TWAV635024

- !! Advisor Candidate Alert _____
- Langhorne, Pennsylvania, United States (Is not mobile)
- 12 years of experience in financial services
- Holds Series 7, 63, 66; Pennsylvania Life & Health; SIE grandfathered
- Holds Series 7, 63, , CFP
- focus has been long
- Core expertise: Wealth Management, Retirement Solutions, Commer

- 📕 Advisor Candidate Alert 🔔
- Hebron, IL (Is not mobile)
- 40 years of experience in financial services
- Holds CFP, AIF
- Holds Series 6, 22, 7, , CFP
- specialized in pre
- Core expertise: Consulting, Asset Management, Succession Planning

- Advisor Candidate Alert
- Gastonia, North Carolina, United States (Is not mobile)
- 10 years of experience in financial services
- focused on new business
- Core expertise: Certified Financial Planner, Wealth Management Services, Mi
- Currently at Marmo Financial Group, LLC
- Available Immediately; desired comp \$110k \$120k

Ref code: TWAV667033

- Advisor Candidate Alert
- Grove City, Ohio, United States (Is not mobile)
- 1 years of experience in financial services
- Holds Life, Accident, and Health Insurance; SIE; Series 7 in progress
- Holds Series 7
- Serves 100 clients/families
- focusing on personal connections first

- Senior Advisor Candidate Alert
- Rockville, Maryland, United States (Is not mobile)
- 10 years of experience in financial services
- Core expertise: Fundraising, Marketing, Facebook
- Currently at TritonPoint Wealth
- Financial Professional | Wealth Management | Investments & Financial Planning
- Available Immediately; desired comp \$140k -\$150k OTE

- Advisor Candidate Alert
- San Anselmo, California, United States (Is not mobile)
- 25 years of experience in financial services
- 20 years of experience in financial services
- Holds Series 7
- Core expertise: Customer Experience, Product Management, Digital Transformation
- Available ASAP; desired comp 250k base + Bonus/Equity

Ref code: TWAV679023

- !! Advisor Candidate Alert ____
- New York, New York, United States (Is not mobile)
- 1 years of experience in financial services
- Holds SIE, Series Seven
- Manages \$500M AUM
- Holds Series 66,
- focused on fixed

Ref code: TWAV693009

- 📙 Advisor Candidate Alert 🔔
- P Lansing, MI (Is not mobile)
- 7 years of experience in financial services
- Holds Life and Health, SIE
- Manages \$150M AUM
- Currently at Upstream Investments
- Available Any Day; desired comp 60k+ but flexible. Really wants to get in the door.

- !! Advisor Candidate Alert ____
- New Bedford, Massachusetts, United States (Is not mobile)
- 10 years of experience in financial services
- Holds CFP; Certified Retirement Counselor (CRC)
- Core expertise: Private Banking, Communication, Grassroots Organizing

- Currently at Financial Planning Alternatives
- CFP Professional | Banking & Wealth Management Expertise |

- Advisor Candidate Alert
- Wellesley Hills, Massachusetts, United States (Is not mobile)
- 33 years of experience in financial services
- Holds None
- Manages \$1.7B AUM
- Focus Financial
- Core expertise: Business Relationship Management, Client Services, Portfo

Ref code: TWAV328030

- Advisor Candidate Alert
- Marion, IA 52302 (Is not mobile)
- 12 years of experience in financial services
- Holds Institute of Trading and Portfolio Management certification
- Holds Series 65
- expertise in strategy design
- Core expertise: Investment Research & Management, Systematic T

Ref code: TWAV349025

- !! Advisor Candidate Alert ____
- San Jose, California, United States (Is not mobile)
- 6 years of experience in financial services
- Holds CFP, CFA, ChFC, RICP
- Holds ChFC, CFP
- focus shifted toward holistic financial planning and advisory services
- Core expertise: Protection Planning/Family Security, Retirement Income S

- Advisor Candidate Alert
- Palmyra, New Jersey, United States (Is not mobile)
- 28 years of experience in financial services

- Holds Financial Planning Certificate, Fairleigh Dickinson; CFP exam candidate
- Manages \$100M AUM
- focus is guiding near
- Core expertise: Strategic Thinking, Project Planning, Project Coordination

- Advisor Candidate Alert
- San Francisco Bay Area (Is not mobile)
- 3 years of experience in financial services
- Holds Obtaining his CFP
- 25 years of experience in financial services
- Holds Series 7, 6, , CFP
- Core expertise: Analytical Skills, Data Analysis, Financial Analysis

Ref code: TWAV515123

- !! Advisor Candidate Alert _____
- Lafayette, CA (Is not mobile)
- 2 years of experience in financial services
- Holds Life and Health Insurance
- 5 years of experience in financial services
- Currently at Leonard Financial Solutions
- Available ASAP; desired comp 80-100k Base + 150k total

Ref code: TWAV531491

- !! Advisor Candidate Alert _____
- South Boardman, Michigan, United States (Is not mobile)
- 20 years of experience in financial services
- Holds CFP, CLU, ChFC, LUTCF
- Holds Series 6, Series 7
- Serves 400 clients/families
- focused on clear communication and planning

- !! Advisor Candidate Alert ____
 - Staten Island, New York, United States (Is not mobile)
- 1 years of experience in financial services
- Holds Series 66, Series 6, SIE
- Holds Series 63, Series 66, Series 7
- Core expertise: Customer Relationship Management, CRM, Balance Sheet Review, Fin
- Currently at Primerica Financial Services

- Advisor Candidate Alert
- United States (Is not mobile)
- 2 years of experience in financial services
- Holds CFP candidate (coursework in progress; module 3/7; target May 2026)
- Holds Series 65, CFP
- Core expertise: Series 65, Life and Health Insurance License
- Currently at Nepsis, Inc.