



You are committed to helping others succeed and passionate about delivering an outstanding client experience. Your ability to build relationships and educate clients has made you a natural sales-person. Come join a team that will value your contribution and invest in your future.

The **Expertise** We're Looking For

- Series 66 preferred (required within 90 days)
- Banking, insurance, or financial experience is encouraged
- A CFP is preferred

The **Purpose** of Your Role

As a key member of the investment team, we depend on you to leave a positive and long-lasting impression on customers. In addition to being the face of Greybox, we depend on you to be diligent around compliance, process monetary transactions, and identify sales opportunities. All the while, you will be learning valuable skills to prepare you for your next role on the path

The **Skills** You Bring

- You have superb interpersonal and communication skills, and are eager to interact with prospects and clients
- An aptitude for sales to proactively uncover needs while interacting with your clients
- You diligently pay attention to detail
- Your strong prioritization skills
- Ability to understand the perspectives of others, allowing you to build genuine relationships with others

The **Value** You Deliver

- You are sensitive to the diverse needs of others and are passionate about providing solutions
- Thoughtfully work to resolve transactional, informational and service needs

- Responsible for educating your clients on the numerous products and services available to them

Company Overview

At Greybox, we are focused on making our financial expertise broadly accessible and effective in helping people live the lives they want. We are a privately held company that places a high degree of value in creating and nurturing a work environment that attracts the best talent and reflects our commitment to our associates. For information about working at Greybox, please visit www.greyboxinvestments.com

Greybox Investments is an equal opportunity employer.