

Oppenheimer & Co. – 2025 Financial Advisors

Who We Are:

Oppenheimer & Co. Inc. (“Oppenheimer”) is a leading middle-market investment bank and full service broker-dealer. With roots tracing back to 1881, the Company is engaged in a broad range of activities in the financial services industry, including retail securities brokerage, institutional sales and trading, investment banking (both corporate and public finance), equity & fixed income research, market making, trust services and investment advisory and asset management services.

Job Description:

We are recruiting for our next class of Financial Advisors. Financial Advisors will attend an intensive training program designed to develop our next generation of FAs. This is an excellent opportunity for an individual looking for a career as part of a successful, rapidly growing practice. Teamwork and collaboration are at the core of our culture.

The Financial Advisor Program for CFPs is designed for individuals who have recently graduated college with a financial planning degree and have either recently acquired or are about to sit for the Certified Financial Planning (CFP) designation. These individuals will have expressed a desire to embark on a career path in wealth management and wish to become adept comprehensive financial planners. This program aims to equip participants with the necessary knowledge, skills, and abilities across various aspects of wealth management to allow them to successfully differentiate their offering in a much commoditized business in order to reach the pinnacle of success.

Location:

Financial Advisors will be based in one of the following Branch Locations:

- Chicago
- New York
- Houston

Advisors will also have the opportunity to attend an intensive training session in our New York Headquarters.

Key Responsibilities:

- Provide top quality service to clients with mentoring from practice partners
- Prepare quality analytical reports using various software programs
- Prioritize and organize workflow and collaborate all facets of the operation and administration of client accounts utilizing CRM tool
- Social media and marketing program development
- Prepare key documents including client reports and presentations; new account documents and various other items for client meetings

Qualifications:

- Certified Financial Planning (CFP) designation recently or soon to be acquired
- Bachelor's Degree, preferably in financial planning
- SIE, Series 66, Series 7 required at or soon after hiring
- State Insurance Life, Health & Annuities License
- Must be a team player: proactive, positive, problem-solving disposition, seeking growth and opportunities for advancement
- Possess a high degree of proficiency with MS office products including Word, Excel and Outlook
- Excellent communication skills: verbal, written and interpersonal
- Ability to work in a fast paced, high-energy environment with attention to detail, and ability to meet designated deadlines

Compensation:

The following compensation and benefits disclosure is applicable to all jurisdictions in which this job posting is made. The salary range takes into account the wide range of factors that are considered in making salary decisions including but not limited to your skills, qualifications, experience, licensure and certifications, and other business and organizational needs. At the time of this posting, the current base salary offered for this role is \$75,000 per year. Oppenheimer & Co. Inc. offers a comprehensive benefits package for eligible employees which may include Health, Dental, Vision, Mental Health & Wellness programs, 401(K), and PTO benefits. Oppenheimer & Co. Inc. also offers paid family medical leave and disability benefits to eligible employees where required by applicable law.

The compensation and benefits for this position are based on a full-time schedule for a full calendar year. Pay increment and frequency of pay will be in accordance with employment classification and applicable laws. For part time roles, your compensation and benefits will be adjusted to reflect your hours. Benefits may be pro-rated for those who start working during the calendar year.