Dynamic Recruiting Service

Connecting You With The Talent To Unlock Your Practice’s Potential

Define What You Need

We conduct a needs assessment to determine what skills and qualities are needed in a candidate and design a job description and postings to match.

Review Candidates

We review all interested candidates as well as utilize LinkedIn and referral sources to identify additional potential recruits with the right skills and experience.

Select The Best Fit

We provide a small pool of candidates that have been thoroughly vetted and scrutinized for the right skills, cultural fit, and professional background.

Elite Recruiting Team

Our skilled recruiter team has a robust network of industry professionals to draw upon to find the most talented, high-quality candidates.

Industry Experience

We work in a consulting capacity with practices across the country, allowing us to stay current with the changing needs of advisors and their teams.

Comprehensive Process

Our hands-on, detailed process ensures that only the most qualified candidates make it to your desk for a final interviews.

ADVISOR LEGACY
It’s time to plan for *you.*™

5440 Corporate Drive, Suite 205 | Troy, Michigan 48098
advisorlegacy.com | bthelen@advisorlegacy.com | 734.294.5206

Advisor Practice Recruiting Service

HOW IT WORKS

WHAT WE DO:

We work closely with you and your team to define the qualities and experience of your ideal candidate and utilize our vast network of industry contacts along with third-party job posting services to find, evaluate, and source the most qualified professionals for your practice.

ESTABLISH CRITERIA & BEGIN SEARCH

Define Position

- Practice Fills Out Needs Assessment
- Conduct Needs Assessment Conversation
- Offer detailed job descriptions aligned with practice needs and preferences

Job Posting

- AL Recruiter Post position to primary recruiting outlets (e.g. Indeed) and provide practice with link to job posting
- AL Recruiter will utilize direct sourcing strategies and referral sources

SCREENING

Deep Dive Interview

- AL recruiter conducts deep dive interview (via Teams). Includes questions to evaluate candidates problem solving skills and suitability for the role.

Candidate Recommendations

- AL Recruiter sends a “candidate snapshot” email to the practice for each recommended candidate.
- The snap shot includes their resume, pre-hire questionnaire, and any applicable materials pertinent to the hiring process.

Application Reviews

- AL Recruiter manages communications with candidates

Initial Interview

- AL Recruiter completes initial interview (via Teams).
- After initial interview, candidate is sent a questionnaire to complete (must be done within 24 hours of interview).

**Additional assessments may be assigned, depending on role.*

FINAL REVIEW & HIRING

Final Interviews

- Financial practice holds final interviews (ideally on-site, but in whatever arrangement is necessary for the role).
- Upon completion of final interviews, a post-interview huddle can be done with the hiring practice and AL

** Upon completion of final interviews, a reference check can be completed by the AL Recruiter.*

Final Selection & Hiring

- Send offer letter to the chosen candidate (AL Recruiter can provide an offer letter to the practice).
- Communicate to AL Recruiter when offer is accepted to effectively close the job posting.

On-boarding

- Coordinate all new hire on-boarding (AL not responsible for new hire paperwork as part of on-boarding to new firm).

Ask about our Our Team Development and People Coaching Services!

Schedule A Call Today To Learn More!

Click Here To Schedule