

We are looking for a UNICORN!

The Athena Financial Group is a boutique fiduciary financial planning firm based in Rochester Hills, Michigan. Since 2004 we have been helping women business owners, executives, and professionals achieve financial success. We also help guys, but we have found if you MEET the expectations of a woman, you will exceed them of a man, so we have designed the financial planning firm around how a woman likes to receive information.



Our dilemma? The founder and owner has been in business for nearly 30 years and needs to find her successor. We know it will take a few years to transition a practice smoothly to the next generation. Also, we don't have huge salaries or lavish benefits to lure people.

What do we have? Freedom. Creativity. And asshole free environment. Kids need to be picked up early because they are sick? No one bats an eye around here. Have a creative idea for a new workshop? We love it! Want to come in late because of a yoga class? No problem. At the Athena Financial Group, we know that woman for years have been treated unfairly (That is why we left the large firms). We wanted to build a quality firm that had flexibility for the real lives of people.

Don't get us wrong, we love meeting and exceeding goals. We have high standards for providing service and growing the firm. In fact, we are the second largest 100% woman owned RIA in the state of Michigan. We use some of the top financial technology including eMoney, Orion Advisor, AdvisoryWorld, Redtail, and many more. We love technology that streamlines processes creating a better experience for our clients as well as allowing us to work anywhere, anytime.

Our Unicorn should have:

- A minimum of 3-5 years financial planning experience
- High Level of energy and entrepreneurship
- Integrity
- Organizational Skills
- Excellent Communication Skills
- Sense of humor
- Series 65 (or 63 and 66)
- CFP or in CFP program with ability to finish in two years.
- Desire to be an owner in the business

If you would like to open a confidential dialogue with us, call Diane Young at 248-515-2281.