ARROWROOT
Family Office

CAREER OPPORTUNITY FOR INTERNAL FINANCIAL ADVISOR

Arrowroot Family Office, a growing fiduciary financial advisory firm with office in Michigan, California, and Virginia, is seeking a Financial Planning Associate. The candidate will work closely with our key advisors as well as their clients ensuring that financial plans and strategies are implemented. Arrowroot manages over $150 million in assets, and provide extensive advanced financial planning services to executives, business owners, and professionals.

Duties:

- Working directly with financial planners to serve new and existing clients
- Regularly monitoring clients' financial circumstances and goals
- Involvement in all aspects of pre-client meeting activities and post-client meeting tasks
- Interacting with clients over the phone and in-person professionally and respectfully
- Utilizing financial planning software and effectively communicating results and recommendations to clients and prospects
- Constructing initial, comprehensive financial plans for new clients
- Assisting and leading various projects and process improvements within the firm's financial planning department

Potential: This is a growth opportunity for the right candidate. You will be a trusted member of the team and have the ability to grow in the firm to other positions, such as senior advisor, analyst or managing director.

Ideal Candidate:

- Have a CFP Designation
- 3-5 years' experience in financial services
- Have experience with trading platforms such as VEO, iRebal, Orion, or BlackDiamond
- Experience with eMoney or Right Capital, or equivalent
- Microsoft Office experience
- Redtail CRM experience is a plus
- Excellent organizational skills
- Good written and oral skills

Compensation will be salary based on experience, discretionary bonus based on firm goals, paid time office, and educational advancement opportunities. We also offer a health care subsidy and a safe harbor 401k plan. Which location you work out of is flexible as well as working virtually as appropriate.

What won't you be doing?

Unlike many firms, we are clear about what we don't want you to do. No cold calls, no selling insurance to friends or families. This career is about supporting our extensive clientele and helping implement their financial plans. We are a group of passionate and fun people who like to work hard and deliver exceptional service to our clients.

To apply, please email resumes to diane@arrowrootfamilyoffice.com or call 248-515-2281