

# JOB DESCRIPTION: FINANCIAL PLANNING ASSOCIATE

We are seeking a Financial Planning Associate to join our team. As a Financial Planning Associate, you will assist our group of advisors in developing comprehensive financial plans for clients. This includes organizing and analyzing data, corresponding with clients, and collaborating with advisors to develop strategies and educate clients. This role has three primary components: (a) creating new plans for new clients, (b) updating plans for existing clients, and (c) researching the latest in financial planning strategies.

## *Job Requirements*

We are looking for a highly organized, detail-oriented person who takes pride in providing highly attentive client service. You should have 1-2 years of experience in a similar role and be comfortable communicating with clients.

- Belief in the societal value of financial planning
- Attention to detail and accuracy
- Professional, concise and thoughtful writing ability
- Excellent interpersonal speaking skills
- Extraordinary client service orientation
- A genuine interest in serving and caring for other people
- Organizational and time management skills
- An ability to handle multiple tasks, manage stress and work with minimal supervision
- Comfort with a fast-paced entrepreneurial environment

Qualifications:

- Knowledge of financial concepts and financial data analysis

- Should be willing to work towards getting the CFP certification in the near future

Helpful:

- CFP® certification
- Series 65
- Knowledge of financial planning software

### *Job Benefits*

We offer a competitive salary and excellent benefits in addition to a flex-work arrangement that allows for maximum productivity and work/life balance.