Financial Planner
Job Description

Job Classification: Exempt
Work Schedule: Monday through Friday 8:00 a.m. to 5:00 p.m.
Reporting Structure: Associate Director of Financial Planning
Location: TBD – Open to either Manhattan, KS or Lawrence, KS

Organization:
The Trust Company provides financial advisory, investment and fiduciary management services for approximately 1,300 individuals and business clients and has approximately $1.6 billion in Assets Under Management. The Trust Company provides expertise in the following accounts: discretionary investment management accounts, estate and trust accounts, retirement plans, IRAs, 401(k), profit sharing and charitable foundations.

Primary Accountability:
The Financial Planner is responsible for assisting with client relationships as assigned, preparation and presentation of client financial plans, review of case analysis and modification, and client communications and research. This position will be part of the financial planning team and report to the Associate Director of Financial Planning.

Major Duties:
- Provides support for clients by gathering data, developing financial plan analysis and scenarios, preparing plan updates, packaging and posting meeting materials, and managing meeting notes and action items.
- Attends and participates in client meetings, including the presentation of the client's financial plan and associated recommendations.
- Works with allied professionals on the client's behalf as necessary to develop and update financial plans as well as fulfill client requests.
- Executes client action items and exhibits timely communication with clients to provide excellent client service.
- Develops financial review templates and meeting tools.
- Assists in business development and sales, which may include attending events and participating in community, civic or charitable organizations.
- Involvement in projects and research at the discretion of the Associate Director and the Director of Financial Planning.
- Other duties as assigned.

Qualifications:
- Bachelor's degree in a related field is required.
- Certified Financial Planner™ or commitment demonstrated to earning designation within 3 years.
- Two (2) to five (5) years' experience in dedicated financial planning position is preferred.
- Experience with MoneyGuidePro, BNA Income Tax Planner and/or other planning software is preferred.
- Strong written and verbal communication and grammatical skills.
- Highly proficient technical skills with the ability to analyze quantitative and qualitative information.
- Ability to work both independently and in team settings to show flexibility and versatility.
- Ability to manage a variety of tasks and prioritize individual workload responsibilities.
- Ability to effectively present information in various formats such as one-on-one, small groups or larger seminars.
- Ability to make effective decisions using impeccable ethical judgement.

Physical Demands:

- Ability to sit for extended periods of time.
- Ability to read computer screens, mail, e-mail and talk on the phone.
- Ability to unpack and move supplies up to twenty-five (25) pounds.
- Ability to drive an automobile.
- Ability to travel as directed by position requirements.

Work Environment:

- Professional and deadline-oriented environment in an office setting.
- Interaction with internal and external customers.

Additional Duties:

Additional duties and responsibilities may be added to this job description at any time. The job description does not state or imply that these are the only activities to be performed by the employee(s) holding this position. Employees are required to follow any other job-related instructions and to perform any other job-related responsibilities as requested by their supervisor.

To apply for this position, please submit a cover letter and resume to Mackenzie Blakeslee at mackenzieb@thetrustco.com.