

Financial Planning Assistant

Organization:	EldenStreet Financial
Date Posted:	11/5/2021
Date Needed:	1/1/2021
City:	Herndon
Location:	Virginia
Country:	United States
Primary Category:	Financial Planning
Salary:	\$23.00 hourly
Type of Position:	Full-Time
Education Requirement:	Bachelor's
Experience Requirement:	< 1 year

Description & Details

Growing and successful financial practice in Herndon, Virginia is seeking a positive energetic person who can interact with clients and has an eye for details. We serve high net worth individuals, business owners, and professionals. This position is entry level with the opportunity to advance.

Ideal Applicant:

- Interest in pursuing a career in Financial Planning and Investment Advisory
- Superior attention to detail with strong organizational skills and follow up
- Sharp, professional appearance and have the ability to prioritize and multitask
- Must be highly communicative, organized, friendly, and be able to thrive in a fast paced environment
- Work well individually and as a team player
- Dedicated commitment to provide superior customer service
- Must have strong proficiency in Microsoft Office Suite (specifically Outlook and Excel)
- Strong ethical standards in working with confidential client information

Primary responsibilities will include, but not be limited to:

- Scheduling / preparing Advisors for client meetings
- Managing calendars
- Research and case preparation
- Maintaining client database
- Track open cases to completion and follow up as needed with underwriting department and/or clients
- Communication with clients regarding service issues relating to portfolios
- Other general administrative duties as assigned
- Gathering and validating client data

Requirements:

- Bachelors degree or equivalent in Finance, Financial Planning or Business
- Life and Health license, FINRA Series 63, 66, and 7, or willingness to acquire immediately.

- Ability to read and analyze existing financial documents and spreadsheets.
- Microsoft Office suite proficiency (Excel, Word and PowerPoint)
- Familiarity with financial planning software preferred
- Experience with client management databases

How to Apply / Contact

Please send Resume and Cover Letter to - marguerite@eldenstreetfinancial.com