



***Senior Financial Planner***  
***Responsible for serving client relationships***

- Work closely with primary advisor to understand client goals, enter client data, conduct financial analysis, and write recommendations for financial plans
- Involvement with the entire financial planning process, including:
  - Participate in the data collection process
  - Input information into financial planning software
  - Perform detailed document reviews; analyze client information and situation across the financial planning spectrum to develop plan
  - Research information as necessary on a case-by-case basis
  - Write customized financial plan observations and recommendations for each client case
- Prepare notes/files for meetings with existing and new clients
- Prepare, coordinate and follow through on any needed communication with new or existing clients
- Assist with following up with new client on-boarding process
- Participate in investment committee meetings and conduct investment research as needed
- Tax research and tax return preparation with training provided

**Desired Skills & Experience**

- Bachelor's Degree with major in either Finance, Economics, Financial Planning, or Accounting
- Must have 5-8 years of work experience in Financial Planning field
- Must have either a Certified Financial Planner (CFP) designation or hold a Certified Public Accountant (CPA) designation, with an interest in Financial Planning
- Have a theoretical understanding of the financial markets
- Be able to work independently, but also able to function in a team environment when the situation dictates
- Ability to manage competing priorities in a timely fashion
- Strong attention to detail and systematic follow-through with prospects and clients
- Ability to communicate information in a clear, concise, and professional manner

**Benefits:**

- Salary with opportunity for bonus
- Career track with opportunities for advancement
- 100% employer-paid health and dental insurance plus access to our cafeteria plan
- Retirement plan
- Paid holidays and vacation
- Mentorship and learning opportunities
- Paid professional memberships, paid continuing professional education and conferences

**Qualified candidates should submit their resumes to Susan Cornett, via email, at [Susan@verusfp.com](mailto:Susan@verusfp.com).**