Position Description

Title: Financial Planner/Relationship Manager

Reports to: CEO

The Firm & Expected Opportunity

Kendall Capital is a rapidly growing independent, fee-only advisory firm offering planning and investment services for middle-class millionaires. While we are located in Rockville, Maryland, we have clients all over the Washington, DC area and across the nation. Our knowledgeable, experienced professionals work with individuals and families to deliver customized solutions to financial challenges. We focus on understanding the client's needs first and then help them meet their particular goals by analyzing their financial plans and designing a custom investment mix catered to their unique financial situation.

The Financial Planner/Relationship Manager should be of high moral and ethical character. He/she is extremely detail oriented, organized, and a good listener. He/she must be able to communicate intangible thoughts through written and verbal communications; and has the ability to easily learn new skills.

The Financial Planner/Relationship Manager should possess thorough knowledge of Microsoft Office Word, Excel, and Power Point. The successful candidate has already worked directly with clients, should be able to work independently and manage multiple tasks concurrently. He/she will handle the onboarding of new clients and servicing existing clients. Duties include gathering data, preparing financial plans, forms and reports and communicating with clients. Other duties include managing client requests, consulting with portfolio managers and providing advice in the clients' best interests. The ideal candidate will be a highly motivated individual who possesses excellent written and verbal communication skills and can work independently as well as in a team atmosphere.

The Financial Planner/Relationship Manager is expected to be an integral part of Kendall Capital's future success and should enjoy a hard-working, but collegial small business environment where we all pitch in and work together to grow as a firm.

Duties and Responsibilities

The Financial Planner/Relationship Manager will work within a team environment to understand client needs and maintain high service standards while increasing the efficiency of our firm. Duties include:

Client Service and Financial Planning

a. Develop, implement, monitor and manage unique financial plans based on to client's specific financial goals and objectives.
b. Opening new accounts (Entering data in CRM (Client Relationship Management) software, completing forms, ensuring proper submission and completion of account opening process)
c. Manage client requests for account transfers, cash needs and RMDs, etc.
d. Monitor, update and manage client meeting and service call schedules
e. Be familiar with aspects of the Personal Financial Planning business in order to optimize opportunities to grow our firm.

Marketing/Business Development

a. Participate in networking groups and events (even via video)
b. Be engaged in civic or professional associations
c. Strive to introduce themselves and represent our firm to professionals in complementary fields

Qualifications

The Financial Planner/Relationship Manager position requires the following qualifications:

- Integrity, honest and the highest ethical standard in every aspect of individual's personal and professional life
- Be genuinely interested and passionate for helping people manage and grow their wealth
- Have excellent written and verbal communication skills
- A bachelor's degree
- Certified Financial Planner CFP ® designation
- 5-8 years of experience in the financial services industry and customer service experience a plus.
- Proficiency in Microsoft Office Suite and working knowledge of Adobe Acrobat. Knowledge of Tamarac and Junxure CRM a plus.
- Organized, detail-oriented, able to multi-task

600 Jefferson Plaza, Suite 410
Rockville, MD 20852
Phone: 301-838-9110 Fax: 301-838-9113
Toll free: 877-260-7935 email: info@kendallcapital.com

- Client-first attitude with compassion to help others
- Team player, collaborative, able to work with and through others
- Adaptability to work successfully in a small company environment

Salary and Benefits

Pay/benefits are competitive based on industry standards.

- Compensation package based on experience and bonuses based upon the employee performance and overall success of the firm
- Employer paid 401(k) plan with generous profit sharing contributions
- Benefits include 100% paid for dental, health care for employees with spousal and dependent care coverage available
- Partial and/or full financial support for professional accreditation or continuing education requirements and other education/training opportunities
- Free parking
- It is the goal of Kendall Capital that this individual will grow with the overall success of the firm.

Kendall Capital is an Equal Opportunity Employer