HOPWOOD
Financial Services, Inc.

Support Advisor

Firm's Purpose: To make a meaningful difference in people's lives.

Position Overview: The Support Advisor works directly with the Lead Advisors and Director of Financial Planning to assist with the wealth management and financial planning needs of clients. This position is responsible for providing support to Advisors including data gathering, case design, scenario building, financial plan development and implementation.

Duties & Responsibilities:

- Prepare materials for client meetings; work with other team members to ensure client meetings are prepared for thoroughly and accurately. Attend client meetings and take notes; manage/delegate/complete all meeting follow-up items.
- Provide support in the financial planning process for clients including:
  - Create drafts of financial plans.
  - Prepare retirement forecasts, cash flow projections, insurance analyses, education forecasts, estate flows, etc.
  - Conduct research as needed and work with client's other advisors (attorneys, CPAs, etc.) to obtain all necessary data for financial planning analyses.
  - Identify areas of opportunity and risk for clients based on financial planning analyses.
- Initiate and respond to clients on various items, which may also include miscellaneous requests and advice on various financial topics.
- Perform special request analyses for clients (e.g., mortgage analysis, Social Security analysis, etc.).

Qualifications:

- Bachelor's degree preferably in business, accounting, finance, economics or related experience.
- Working on or successfully completed the CFP exam.
- 1-2+ years of experience (may include internships) in client service in the financial services industry (preferably with an independent registered investment advisory firm).
- Proficiency in Microsoft Office; experience with various financial planning (MoneyGuidePro preferred), CRM, portfolio management and document management software.

Other Skills & Experience:

- Continuously exhibits personal integrity and professional initiative.
- Reliable, follows through on commitments, does not shrink from new challenges.
- Possesses a passion to help new and existing clients.
- Must be organized, detail-oriented and able to manage and prioritize tasks.
- Demonstrates a commitment to accuracy by delivering high quality work.
- Excellent written and verbal communication.
- Self-starter who can meet deadlines working independently when needed.
- Flexible team player who is highly adaptable to change and open to new ideas.
- Demonstrated ability to work successfully in an entrepreneurial, small company environment.
- Maintain professional competencies and adhere to the firm's ethical standards and cultural values.

Salary Range: $55,000 - $62,500. Experience taken into consideration.
Benefits: Medical and dental coverage, 401(k), L-T disability, paid PTO and holidays.