



Capital Portfolio Management

Position Title: Planning Associate

Work Schedule: Monday through Friday 8:00 a.m. to 5:00 p.m.

Location: Topeka, Kansas

Organization:

Capital Portfolio Management, LLC (CPM) is an independent and privately owned Registered Investment Advisory firm founded in 2003. We are a boutique investment firm that provides collaborative planning and investment management for a select group of clients. We pride ourselves on being both experienced and large enough to design and implement any investment strategies needed while staying adaptive and small enough to provide personal attention to each client.

Associate Responsibility Description:

The Associate Planner is responsible for assisting an experienced planning professional and the Portfolio Managers of CPM with client relationships as assigned. This position will be part of the planning focus of CPM. This includes but is not limited to, collection and input of client data, preparation of client planning and preparation for client meetings.

Primary 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.



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- Assists in business development and implementation, which may include attending events and participating in community, civic or charitable organizations.
- Involvement in projects and research at the discretion of other CPM associates.
- Other duties as assigned.

Qualifications:

- Bachelor's degree
- Certified Financial Planner™
- Experience with MoneyGuidePro 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.

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 CPM management.

Benefits:

- Health insurance
- 401k match
- Possible profit-sharing contributions

Contact:

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Send resume to: Jdejulio@cpm-llc.com