

# Financial Planner

## A New Path Financial

Job Posting

March 28, 2022

### **Develop your own financial planning practice within an established organization.**

About Us: A New Path Financial was founded in 2013 as an independent financial planning firm by Nadine Burns, MBA, CFP®, AIF®.

- Our goal was to always work in the Client's Best Interest
  - No quotas for our advisors
  - No products to push

As a wife/mother/daughter and business owner, Nadine realized that work should have life balance and the work and client care comes first. People really could use our help, and we do not need to "hard sell" or push products, we need to listen and help.

Our WHY: To help individuals who have, or are facing challenges or transition, use their financial resources to THRIVE!

Our Core Values:

1. Respectful Compassion
2. Self-Motivation
3. Collaboration
4. Transparency
5. Life Balance

Expectations:

- Develop a client base of business
- Conduct financial outreach (Social Media or workshops)
- Conduct financial planning using the CFP® Board Principles
- Use of Financial Planning software to create and monitor plans

Qualifications:

- 3+ years of experience working directly with clients
- Must have existing client base (minimum of \$10M in assets under management)
- Bachelor's degree from an accredited institution
- CERTIFIED FINANCIAL PLANNER™ Professional or willing to obtain within 2 years of hire.
- A clean FINRA or SEC record
- Shows curiosity and confidence with working with clients
- An interest in developing a client Niche that meets their personal passion.

What we deliver:

- A New Path Financial is a leading firm in Michigan. We are branded, and have been published in CNBC, Yahoo Business, Bloomberg and Investment News.
- We work on a Fidelity NFS platform and have both Fee Based and Brokerage account options
- Our Broker Dealer is Sigma Financial Corporation

- Our RIA is Sigma Planning Corporation (SPC)
- We have up to date Presentations and Workshop content
- Redtail Client Relationship Management System
- Ann Arbor Office space and conference space: Telephone, Printer, Laptop computer
- Interactive and Proactive website with content
- Financial Planning Software (Emoney)
- Firm Marketing initiatives
- A team that operates with dignity
- Operations group to help submit paperwork
- In house IT Team support
- Administration team, sends cards/gifts to clients, can do scheduling

What we will **not** ask of you:

- No lists of your family and friends to “sell” to
- No weekend hours, unless you schedule it for yourself
- Demanding work hours

How to Apply:

Email your interest with background to:

- Email: [NBurns@anewpathfinancial.com](mailto:NBurns@anewpathfinancial.com)

Ann Arbor Address: 3003 Washtenaw Avenue, Suite 4, Ann Arbor MI 48104

Website: [ANewPathFinancial.com](http://ANewPathFinancial.com)

Direct Phone: (734) 330-2266

Securities offered through Sigma Financial Corporation, member FINRA (FINRA.org) and SIPC (SIPC.org).

Investment Advisory services offered through Sigma Planning Corporation, a Registered Investment Advisor. A New Path Financial, LLC is independent of Sigma Financial Corporation and Sigma Planning Corporation.