FINANCIAL PLANNER / FINANCIAL ADVISOR

People are our business. Our clients' families and futures are the focus of all our personalized wealth management solutions at Tri-Star. We believe everyone deserves to move their financial life forward, make well-informed decisions, and fulfill their financial vision. We continue to see tremendous growth in our client base and a rapidly growing demand for our services. Are you ready to join our caring team of professionals so we can help more clients every day?

Why Tri-Star?

- We invest in genuine relationships, both inside and outside our firm – you'll quickly notice what makes our people special.
- We act in good faith and hold ourselves to a higher fiduciary standard.
- We adhere to a Higher Purpose that is a driving force in our culture: *Building caring, genuine relationships that strengthen families and transform communities.*
- Tri-Star has proudly given back an average of 10% of our earnings annually as grants/donations to the communities we serve.
- We serve over 1,100 relationships and manage over $2.2 billion in client assets.
- Please visit our website at www.tristartrust.com to learn more.

Responsibilities of this position:

- Lead clients in the creation of financial plans and financial strategies
- Help clients reach their unique financial goals
- Counsel and educate clients and the Tri-Star team on personal financial matters
- Organize a written, comprehensive financial plan into a clear, concise, and compelling presentation
- Communicate the plan/strategies in person, on Teams/Zoom, or via phone
- Work with your Tri-Star team to implement the plan
- Research new laws, financial opportunities, and solutions
- Master the financial planning software and supporting systems

Qualifications:

- CFP®, CPA, or similar designation
- 3+ years of financial planning or 5+ years of accounting, tax, or estate planning experience
- 2+ years of experience in a client advisory role
- Understanding of the financial markets and tax laws
- Ability to effectively explain complex financial concepts
- Experience in eMoney a plus
- Basic knowledge of PowerPoint & Excel

Perks & Benefits:
We value each team member and their contribution to Tri-Star's success, so we invest in your career and your future through a comprehensive benefits package, including:

- Competitive salary based on experience
- Annual bonus program available for achieving personal goals and corporate goals
- Paid professional dues (CFP®, CPA, etc.)
- 401k with employer match
- Health, dental, vision, and life insurance
- Flexible Spending Account for healthcare and childcare
- Paid PTO days and holidays
- Paid maternity and paternity leave
- Referral Program

About Tri-Star:
Founded in 2000, we are a Michigan state-chartered bank with locations in Saginaw, Midland, Frankenmuth, and Lansing. We manage over $2.2 billion in client assets, serving over 1,100 relationships.

Interested in this exciting opportunity? Please send your cover letter and resume to sandy@tristartrust.com.