VINTAGE FINANCIAL SERVICES, LLC

Registered Investment Advisor

JOB DESCRIPTION

TITLE: Senior Financial Planner

The senior financial planner works with the advisory team to support and achieve the goals of our clients. Investment trades, portfolio rebalancing, financial plan creation, financial plan updating, tax preparation, tax planning are all activities that ensure the senior financial planner becomes a trusted advisor for our clients.

CHARACTERISTIC DUTIES AND RESPONSIBILITIES

- Proactively monitor clients' financial situations with attention to detail and accuracy
- Relationship management and client communication
- Manage and lead all aspects of pre-client meeting activities such as preparation of meeting agendas, client paperwork, asset allocations.
- Manage post-client meeting tasks such as developing meeting notes, performing financial analyses, and coordinating planning implementation with outside professionals, if necessary
- Prepare financial plans and retirement projections
- Assist with trading and rebalancing of client investment accounts
- Maintain client records in CRM and document management software
- Interact with clients over the phone and in-person professionally and respectfully
- Facilitate efficient office operations including leading and assisting with process and system improvement projects
- Participate in the idea generation, research and writing of articles
- Within the first 6 months, become the trusted advisor for a portion of the firm's clients
- Assist with the strategic leadership of Vintage
- Maintain 80 – 120 clients and 30 – 100 annual tax returns.

SUPERVISION RECEIVED

- General supervision is received by chief operations officer. Close collaboration is expected with all other members of staff.

SUPERVISION EXERCISED

- None

REQUIRED QUALIFICATIONS

- B.A. or B.S. degree from an accredited CFP Board registered financial planning program or other finance related B.A. or B.S. degree and CFP certificate program.
- Pass CFP certification examination within first two years of employment. CPA/PFS is also acceptable.
- Show curiosity and confidence when dealing with clients and other team members
- Above average knowledge of Microsoft Office, especially Excel

DESIRED QUALIFICATIONS

- Experience working with Junxure Cloud, Right Capital, Holistiplan, UltraTax, YCharts, Steele Systems, Morningstar, and Raymond James and Schwab systems is helpful, but not required.

All inquiries should be emailed to Jack McCloskey at jack.mccloskey@vintagefs.com.

This position is classified as exempt according to FLSA guidelines.

Approved: Jack McCloskey 11/22/21