

Financial Planner and/or Paraplanner

About Physician's Resource Services:

Physician's Resource Services strives to make financial planning easier for physicians and their families. For decades, PRS has worked with physicians to help them transition from residency to practice and prepare for retirement. PRS's objective is to save our clients valuable time by reducing the hours spent planning and organizing their finances. Our team of advisors offer guidance in each core element required for a comprehensive financial plan: insurance, investment, tax, and legal – all working together as one team. Our goal is to give clients back their time, allowing them to be a better doctor, spouse, parent, and friend.

Job Description:

(THIS ROLE IS REMOTE): Physician's Resource Services is looking to add a full-time Certified Financial Planner with 3+ years of industry experience to our fast-growing financial planning team. This person should have experience with data gathering, analyzing information, and identifying goals. This role could be a fit for an experienced financial planner looking to be part of an independent firm with infrastructure, technology, resources, and a consistent flow of qualified prospects, with the capacity to onboard additional planning clients, and/or for a full-time Financial Planner (CFP) who enjoys working with clients without the pressures of business development. This role has the potential to expand into a financial planning lead advisor role.

Primary Tasks:

- Attend client meetings and take extensive notes.
- Data Gathering and identify client goals.
- Analyze the client's current course of action.
- Analyze potential alternatives for accomplishing client's objectives.
- Develop the financial planning recommendations.
- Present custom analyses of financial planning recommendations.
- Prepare presentations and other materials necessary for client meetings.
- Enter client information into financial planning software and CRM (Salesforce).
- Communicate with internal departments (Risk Management,

Investments, and Tax) to implement solutions.

- Communicate with external professionals to implement solutions.
- Monitor progress of recommendations.
- Update financial plan with current qualitative and quantitative information.
- Update client goals, recommendations, and implementation of plan.
- Assist firm with retention of planning clients.
- Understand and support PRS's vision, mission, and strategy.

Our ideal candidate should also have the following skills:

- Has earned their CFP designation and is dedicated to continuing improvement of industry knowledge.
- Be a great teammate.
- Organized.
- Self-manager-Understanding of how to manage tasks and responsibilities in remote setting.
- Comfortable with technology such as: eMoney, Holistiplan, Riskalyze, Black Diamond, Excel, Zoom, and Salesforce

This is a full-time, remote, W-2, salaried position with bonus potential. Physician's Resource Services offers a 401k with match and health benefits assistance.

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Visit our website at <https://physiciansrs.com>