



Dallas, Texas

Associate Financial Planner

Caleb Brown
Recruiter

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INTERESTED?

Apply here:

<https://bit.ly/3Qizoun>



NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing an RIA in Dallas, Texas that is seeking an Associate Financial Planner to join their team. Detailed job specifications available once we connect and agree it is a mutual fit.



FEE-ONLY, TEAM-CENTRIC, HOLISTIC PLANNING

Our client is a premier financial planning and wealth management firm in Dallas, Texas. They provide clarity, insight, and direction to their younger, high earning, clients to help them achieve their life goals in an ongoing collaborative relationship. They offer the ideal candidate client-facing experience, mentorship, and clear growth tracks within a dynamic team environment.



RESPONSIBILITIES WE'LL TRUST YOU WITH

Prepare for and participate in advice delivery in client meetings. Create, develop, and edit client deliverables. Collect, organize, and analyze client information for client onboarding. Leverage technological platforms to support client and financial transaction related matters. Support the senior planners in a multitude of organizational, client service and advisory functions.



QUALIFICATIONS

Bachelor's degree in financial planning or related field from an accredited university. At least 3 years of work experience and pursuing CFP® certification. Tax planning knowledge and experience is a plus. Keen attention to detail. Excellent written and verbal communication skills. Strong interpersonal skills. Ability to follow and refine existing procedures. High EQ and sense of curiosity. Team player.



THE PERKS

Competitive salary starting at \$75k+ based on experience, plus bonus opportunities. Hybrid work environment. Health insurance for eligible employees. Life insurance. Short term disability. Long term disability. Parking. Flexible vacation policy. Simple IRA with 3% match. Additional benefits available through TriNet. Work-life balance. Ongoing education and training opportunities.