Generational Wealth Advisors
Senior Financial Planner
Non-Exempt Position; Reports to Director of Financial Planning

Position Summary:

The Senior Financial Planner role primarily completes and delivers financial plans to clients as assigned by the Director of Financial Planning. We are seeking an individual who has a passion for assisting High Net Worth and Ultra High Net Worth families in managing and growing their assets. This position is geared toward a person who works well in a team atmosphere and is comfortable in a fast-paced environment. A significant portion of the role will be client-facing, so the individual should be comfortable with client interaction throughout most of their day.

The preferred candidate has already obtained the CFP® credential, has 3 – 5 years of experience in creating and delivering financial plans and investment recommendations, and is comfortable developing client relationships to capture assets under management.

Responsibilities:

- Primary responsibility is creating and delivering comprehensive financial plans to clients of Generational Wealth Advisors. This includes collecting relevant financial information from clients, transferring information into planning related software, preparing and delivering financial reports, and working with other members of the financial planning team
- Ongoing management of client relationships including updating financial plans and maintaining investments portfolios
- Lead and attend both in-person and web-based (Zoom/Teams) client meetings
- Coordinate with outside professionals related to client management such as attorneys, tax professionals, M&A advisors, etc.
- Manage and complete multiple tasks in a timely manner. Tasks are both recurring and ad-hoc based on client needs
- Work directly with operations team to execute on operational tasks and support higher level operations related projects
- Support business development efforts which may include attending prospect meetings, preparing reports or information for prospects, managing follow-up discussions with prospects
- Provide direct Sr. Advisor support by answering client questions, collecting information, and assisting with the client accounts and dashboards, liaising with financial custodians, and vendors
- Coordinates client meetings for the advisor team
- Monitors client accounts and reviews client records to ensure accuracy

Key Competencies:

- Bachelor's degree from accredited university with study in finance, accounting, or related field.
- Current CERTIFIED FINANCIAL PLANNER (CFP®)
- 3+ years' experience working in a wealth management related position, including client-facing responsibilities
- Previous experience using MoneyGuidePro, eMoney or similar financial planning software
- Experience using CRM system
- Excellent time management skills, ability to multitask and meet deadlines
- Active listening and observation skills with proactive problem-solving abilities
- An understanding of general business principles with ability to review and organize financial documents
- This position is full-time in-person at the Generational Group headquarters in Richardson, TX
- This role requires regular work outside normal business hours to ensure tasks are completed in a timely manner or to meet with clients or prospects, including occasional business travel