New Planner Recruiting

Walnut Creek, California

Associate Financial Planner

Caleb Brown
Recruiter
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INTERESTED?

Apply here:
https://bit.ly/458lSSf

NEW PLANNER RECRUITING

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

$1.2 Billion AUM, SEC RIA, FAST GROWING

Our client is a fee-only financial planning firm located in Walnut Creek providing comprehensive financial planning to clients nationwide. The new hire will have the opportunity to join an established firm that goes much deeper with the planning engagement than the average firm. They are seeking a new hire to provide additional support to serve new and existing clients. This is the perfect opportunity for someone looking for a challenge who wants to grow with the firm.

WHAT YOU WILL GET TO DO

Support lead advisors in the preparation of financial planning materials and development of planning and investment recommendations. Coordinate the implementation of planning recommendations with outside professionals when necessary. Be available to field ad hoc questions from clients, and complete ad-hoc tasks. Improve the quality of lives of the clients served and assist firm in serving more clients through expanded capacity.

QUALIFICATIONS

Bachelor's degree from an accredited university. At least 2 years of financial planning experience. Familiarity with eMoney and Holistiplan a plus. CFP or pursuing CFP certification. Excellent written and verbal communication skills. Well above average curiosity. Ability to identify, meet, and follow through with client needs and requirements. Be a self-starter, problem solver, and goal-oriented team player.

THE PERKS

Starting base salary range of $100k+ based on experience, plus bonus opportunities. Health, Dental and Vision insurance. 401k with Safe Harbor match plus potential discretionary match. PTO. Clear growth track to advisor position.