Financial Planning Analyst

About Spark Financial Advisors

Spark Financial Advisors is a fee only, fiduciary financial planning and investment management firm serving clients locally in Richmond and Williamsburg, VA, and virtual clients nationwide. We specialize in high-income women, dual-career couples, and business owners. Our clients are extremely busy and value a responsive, caring, and tech-friendly service.

We are proud to serve clients from a variety of backgrounds, and you must be comfortable working with a diverse clientele in order to be successful here. We are LGBTQIA+ affirming.

Our Core Values

Act with Integrity
Listen Deeply

Treat People with Respect
Have a 'Can Do' Attitude

About the Financial Planning Analyst Position

We are a financial planning-first firm, so your role is mission critical to the success of our team.

The Financial Planning Analyst will be responsible for client research, financial document review & analysis, financial plan creation, client meeting preparation, attendance & follow-up, ongoing support for client requests & questions, portfolio rebalancing and account opening & maintenance.

About You

You like people, even when they're frustrating. You have held a job before. Any job will do because you aren't afraid of hard work, and you know how to work on a team. You have high emotional intelligence, and your friends confide in you. You have a four-year degree from an accredited institution. You're curious and like to learn. You're organized and know how to see a project through to an on-time completion.

Your skills include:

Detail Oriented
Strong research and writing abilities
Listening
Impeccable manners
Process oriented
Follow-up
CFP® Professional, Candidate, or working towards certification*

* Our clients are high achievers and experts in their field, we expect the same from our team members. To progress from this role to a Lead Advisor role you must obtain the CFP® designation.

Position Details:

This is a full-time position in Richmond, VA. Our goal is for this role to evolve into a Lead Planner or Service Advisor role depending on your interests and the needs of the firm.

Pay range is $60,000 - 70,000 base depending on your direct financial planning experience and progress towards your attainment of the CFP® certification. The upper end of the range is for folks who have already passed the CFP® exam.

We will pay for a CFP® Exam prep course and reimburse you for the CFP® exam fee once you pass.

5-10% bonus target

401(k) contribution of 4%

Support for conference attendance

Three weeks of vacation plus all stock market holidays

Group Long-term and Short-term Disability Insurance

Please email your resume to work@sparkfinancialadvisors.com