MASON

Job Title

APPLY HERE

Associate Planner

- $55 - 65K + Bonus
- Remote (Eastern Time Zone) + Full-Time
- Medical, Life, and Long-Term Disability Insurance
- 401(k)

Who We Are

Mason & Associates isn't your typical financial planning firm—and we like it that way. We're a second-generation, fee-only RIA with a vision for growth, grounded in client-first service and deep expertise.

We're proud of our roots and excited about what's ahead. We've built a national reputation for serving federal employees through specialized knowledge and strong, lasting relationships. Their unique needs allow us to deliver deeply personalized planning while giving our team the opportunity to master a focused niche. That's why we're building clear paths for financial planners to step into meaningful client-facing roles—supported by mentorship, collaboration, and a culture that shares knowledge freely—so growth happens at a pace that matches each person's skills, ambition, and readiness.

We proudly host the Federal Employee Financial Planning Podcast and have been featured on leading stages such as the Kitces Financial Advisor Success Podcast and XYPN LIVE. Our team includes recognized leaders—Top 40 Under 40 advisors, FPA Chapter Past Presidents, and AICPA honorees—who bring both expertise and vision. Recognized on the prestigious Inc. 5000 list, we're a nationally respected, forward-looking firm with deep roots, bold vision, and an open door for those ready to help shape what's next.

Why Federal Employees Are an Exceptional Niche

Federal employees are among the most mission-driven, high-impact professionals whose work keeps our nation running. Our clients serve in some of the most exciting and respected institutions in the country—the military, the Department of Defense, NASA, the National Institutes of Health, the FBI, and the Drug Enforcement Administration. They're the hidden C-Suite: financially successful, humble, and a pleasure to work with.

Our deep knowledge of federal benefits, TSP, and healthcare means we don't waste valuable client time getting up to speed. Instead, we focus right away on adding value, building trust, and creating strategies that make a real impact. Now more than ever, federal employees need guidance to navigate new retirement opportunities and government changes.

About The Role

Are you ready to start your career as an Associate Planner?

At Mason & Associates, you'll build a strong foundation in financial planning, deepen your expertise in federal employee benefits, and grow your career over time. This is an associate planner role where you'll support our team and learn the intricacies of comprehensive planning. Over time, you may grow into leading portions of client meetings, but this role focuses first on developing your skills. Experience in this niche is a plus, but what matters most is your ability to learn with care, follow through consistently, and deliver thoughtful, high-quality work. The role is full-time, with flexibility for remote or hybrid work.

You'll work closely with partners and senior financial planners who specialize in serving federal employees, contributing directly to client relationships while deepening your knowledge of federal benefits and retirement strategy. In this role, you'll prepare meeting materials, conduct financial planning and analysis, and help translate recommendations into clear, actionable steps for clients.

We're looking for a proactive, process-oriented professional who's organized, able to support multiple financial planners, and eager to learn. This is an entry-level associate planner position, so you don't need client-facing experience yet. High client service standards and follow-through are essential. If you have a strong foundation in financial planning fundamentals and are excited to grow your career with a supportive team, we'd love to meet you.

You won't be expected to bring clients, do business development, or manage others. Instead, you'll support and grow relationships with both new and existing firm clients, with career paths available for those who want to grow in leadership, business development, or other areas over time.

Client Management

- Serve in a support role for senior planners—contributing to all aspects of the planning process.
- Over time, you may grow into supporting portions of client meetings and taking on more responsibility, with the full support of senior planners guiding your development.
- Serve as a point of contact for client needs between meetings, helping address questions, coordinate timely responses, and provide planning guidance as life situations and opportunities arise.
- Support data gathering and initial analysis for the development of financial plans and the delivery of client services.
- Support prospect meetings by helping explain the firm's process and assessing mutual fit, with opportunities to lead portions of the conversation as your role grows.
- Collaborate with senior planners in a team-based environment where client relationships and expertise are shared across the firm.

Financial Planning

- Support senior planners in preparing for and following up on client meetings, including drafting summaries, updating plans, and tracking action items.
- Review client goals and financial objectives to support the development of comprehensive, personalized financial plans—including tax and investment recommendations aligned with each client's goals and values.
- Support ongoing tax strategy, including income tax projections, Roth conversions, withholding adjustments, and charitable planning. Familiarity with Holistiplan, CCH, and multi-state tax rules is a plus.
- Build subject matter expertise in FERS and CSRS retirement systems and apply that knowledge to help federal employees optimize their retirement benefits and long-term planning strategies.
- Monitor client plans proactively, identify areas for updates, and coordinate the delivery of needed services in collaboration with planners and client service team members.

- Collaborate with a senior planner to prepare investment recommendations that align with the client's financial plan and firm-wide strategy, including considerations of tax efficiency and asset allocation.
- Monitor client portfolios to ensure they remain in the correct model, confirm accurate billing, and address excess cash positions in alignment with firm investment strategies.
- Maintain accurate records and planning documentation within the firm's CRM and financial planning tools to ensure continuity, compliance, and a high-quality client experience.
- Communicate clearly and consistently with clients and their professional advisors (e.g., accountants, attorneys) to support integrated planning.
- Adhere to all compliance and risk procedures, follow firm policies and regulations, and stay current through ongoing education and internal training.

Skills & Experience

We're looking for candidates who bring the following skills and experience to thrive in this role.

- 0-2 years of experience in financial planning, wealth management, or a related field. New graduates with relevant coursework or internships are encouraged to apply.
- FPQP® designation, CFP® coursework, or paraplanning background strongly preferred, including candidates actively pursuing CFP® certification.Series 65 (or within 6 months), unless the CFP® designation or an equivalent credential is already held
- Desire to develop investment management skills, including rebalancing, allocation adjustments, account maintenance, and providing client recommendations.
- Strong interest or experience in comprehensive tax and retirement planning. EA, CPA, or prior tax preparation experience is a plus, but not required.
- Strong verbal and written communication skills, emotional intelligence, and the ability to build trust with clients and colleagues.
- Highly organized and detail-oriented, with the ability to manage financial data, perform accurate analysis, and keep planning tasks and timelines on track.
- High integrity—you own your mistakes, act with transparency, follow through, and show up for your team—always putting clients' interests first.
- Experience with our core platforms (Axos, GeoWealth, Wealthbox, RightCapital, Holistiplan) or similar tools is a plus, with the ability to learn new systems quickly.
- Eager and committed to ongoing learning and professional development.
- Willingness to work Eastern Time (or near-ET) hours and travel a few times a year for in-person team meetings.

Compensation & Benefits

This is a full-time, W-2 associate planner position with a salary range of $55,000 – $65,000, depending on experience and credentials. Bonus eligibility is based on the role scope and performance. Applicants with a CFP® certification may be considered for growth in client-facing responsibilities over time with adjusted compensation.

Benefits include Flexible Fridays, 100% firm-paid health insurance for employees (50% for dependents), a 401(k) with 3% automatic safe harbor contribution plus a 50% match on employee contributions up to 5% of compensation, PTO, paid holidays, support for licensing and professional development, and a remote or hybrid work structure.

Questions?

Contact resumes@talentlinksolutions.com with any questions, or **click here to apply directly.**