



Caleb Brown
Recruiter

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INTERESTED?

Apply here:

<https://bit.ly/4mDusO5>



Dallas, Texas

Associate Financial Planner



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 based 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 preliminary fit.



GROWTH ORIENTED, TEAM ATMOSPHERE

Our client is a team with a mission to help clients make smart choices about money, they pride themselves on allowing their clients to enjoy life and worry less. Our client provides comprehensive financial planning that is tailored towards individual needs. They are dedicated to their core values of being kingdom focused, having a servant's heart, constant improvement, getting stuff done, and having fun. If you are looking for strong mentorship and a growth-oriented role, this is the one for you.



WHAT YOU WILL GET TO DO

Learn the financial planning business by assisting in developing client review materials. Participate in client reviews and ensure that follow-up items are being completed. Open new accounts and performing account maintenance requests. Maintain accurate and complete client information in the database. Service client needs as determined by the Operations team. Adhere to all company and industry supervisory guidelines and policies.



QUALIFICATIONS

Bachelor's degree from an accredited university. Progress towards CFP® preferred. Knowledge of Financial Advisor office tools (Orion, Salesforce, etc.) preferred. Knowledge of Microsoft Office required. Desire to obtain CKA designation in the future. Alignment with their Core Values and Mission Statement.



THE PERKS

Starting base salary range of \$60k+ based on experience, plus up to 10% bonus opportunity. 401(k) plan with a company match of 4%. Annual discretionary company profit sharing. 23 PTO days. Health insurance. Professional Designations (CFP®, CKA, etc.) reimbursement. Service Days – employee is eligible for 3 additional paid days off that are dedicated to service.