



Caleb Brown
Recruiter

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INTERESTED?

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Virtual 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 that is seeking a Financial Planner to join their team. Detailed job specifications available once we connect and agree it is a mutual preliminary fit.



\$140M+ AUM, MENTORSHIP, RELATIONSHIP FOCUSED

Our client is a boutique financial planning firm serving mass affluent pre-retirees. They focus on practical, tax-efficient retirement income strategies that give clients clarity and confidence. The firm is working towards increasing capacity for faster growth. This is the perfect opportunity for someone who is looking to grow their financial planning career in a supportive environment with mentorship from the founder and Senior planner.



WHAT YOU WILL GET TO DO

After hands-on training, their team will transition new client relationships to you, with two CFPs helping to fill and support your client list as you step into the lead role where you will build and manage financial plans using RightCapital and Income Lab. Incorporate tax-aware planning. Participate in weekly team syncs (virtual Monday meetings + planner "office hours"). Communicate daily via Slack and Voxer. Contribute to internal system and process improvements, project work, marketing ideas, etc. Be a part of a culture dedicated to continual improvement and constantly simplifying while increasing value for the clients and making your own work lives more effective and fulfilling.



QUALIFICATIONS

Bachelor's degree from an accredited university. At least 2 years of financial planning experience. CFP® certification (or passed exam and actively pursuing hours). Empathetic, detail-oriented, and well above average communicator. Wants to be part of a team and serve a growing list of clients well. Eager to build strong client relationships over time. Willing to adapt and pitch in when things change or evolve. Working knowledge of RightCapital and Holistiplan are a plus. Candidates located in the DFW, TX area preferred.



THE PERKS

Starting base salary range of \$95k+ based on experience, plus 15% bonus. Health insurance. Untracked paid vacation days. 401k match. Annual company trip. Clear growth track to taking the lead on new clients.