



Caleb Brown
Recruiter

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INTERESTED?

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<https://bit.ly/48yDsyC>



Greater Dallas, Texas

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 Frisco, TX that is seeking an in person Financial Planner to join their team. Detailed job specifications available once we connect and agree it is a mutual preliminary fit.



\$300M AUM, FAST GROWING, SEC RIA

Our client is a premier financial planning and wealth management firm that has doubled AUM within the last year. They serve high net worth clients specifically targeting business owners, corporate executives, and physicians. They offer the ideal candidate a financial planning focused opportunity, strong mentorship, and clear growth path to a lead advisor role in a rapidly growing firm.



WHAT YOU WILL GET TO DO

Provide multidisciplinary financial planning services to new and existing clients as an integral part of an ensemble team. Develop planning scenarios for client brainstorming sessions, create and deliver recommendations and assist with follow-up planning items. Provide concierge level of service by solving client problems and helping to improve their lives.



QUALIFICATIONS

Bachelor's degree from an accredited university. 3+ years of financial planning experience preferred. CFP® certification or have passed exam. Strong client presentation skills. Excellent written and verbal communication skills. Ability to identify, meet, and follow through with client needs and requirements. Desire to grow into a lead advisor role. Working knowledge of eMoney and Holistiplan are a plus.



THE PERKS

Starting base salary range of \$100k+ based on experience, plus bonus opportunities. 3% non-elective 401k match. Employer-paid disability & life insurance. Generous vacation and PTO policy. Clear growth track to advisor role. Demonstrated proof of developing and promoting talent.