**Associate Financial Planner**

Full-time permanent position in Austin, TX

Join us to help others achieve their financial and life goals by using your analytical, relationship, and organizational skills. Your job will focus on supporting advisors in the financial planning process as well as in back office operations. Position requires independent work and team work. Count on company support as you work towards a Series 65 securities license and the Certified Financial Planner designation.

**EDUCATION & EXPERIENCE REQUIRED**

* **Bachelor’s Degree** 
  + Preference given to Personal Financial Planning majors or minors
  + Related degrees or commensurate experience also considered
* **Customer service experience** (through volunteer, school, athletic or paid roles)
* **Team leadership experience** (through volunteer, school, athletic or paid roles)

**REQUIRED ABILITIES**

* Work independently
* Analyze financials
* Build relationships internally and with clients
* Listen and ask meaningful questions to clients and team members
* Organize thoughts for written communications using good grammar
* Manage and follow-up on details
* Solve problems
* Adapt to new technology as new systems are implemented

**PERSONALITY THAT FITS OUR TEAM**

* High integrity
* Sense of humor
* Strong work ethic
* Giving and gracious

**VALUE YOU WILL DELIVER TO CLIENTS**

* **Solutions.**  After gathering client data and using state-of-the art software to analyze the data, you will work with senior advisors to make recommendations addressing identified client needs.
* **Motivation.** Using facts and emotional intelligence, you will work with senior advisors to move clients to take needed action.
* **Peace of mind.** By monitoring to ensure custodian tasks are processed promptly and accurately, you will help our clients rest easy as we oversee their financial details.
* **Relationships.** Our relationships with our clients are special, often categorized as friendships. Your role will provide you with regular direct interactions with clients by email, phone and in person.

**IMPACT YOU CAN MAKE AT OUR COMPANY**

* **Bring us new ideas.** We support ongoing professional development, so you can then bring that learning back to the organization.
* **Sustain our positive company culture**. You will join us in our weekly kick-off meeting where we share celebrations, appreciations and need-to-know information.
* **Shape our company strategy.** We will ask for your ideas and feedback in our annual strategic planning process as well as in many other meetings.

**COMPANY OVERVIEW**

As one of the nation’s first fee-only wealth management firms, we are dedicated to delivering ethical advice to our clients with excellent customer service. Our firm is growing and we are expanding into new service areas for our clients.

Our team is comprised of professionals holding some of the highest credentials in the industry. Employees work independently as well as in teams. Because of our growth, team members are expected to learn about other areas of the business and assist as needed to graciously serve our clients.

We have been a finalist for the *Austin Business Journal’s* “Best Place to Work in Austin” prize every year since 2004, and we have won the small business category three times. Expect to have fun while getting the job done.

Benefits include:

* medical and disability insurance
* 401(k) plan
* stock options
* relocation expenses, under select circumstances
* support for ongoing professional development

**TO APPLY**

No phone calls, please. Email resume to [amy@slaughterinvest.com](mailto:amy@slaughterinvest.com). If available, include your Financial DNA and StrengthsQuest profiles. (Graduates and candidates graduating up to May 2018 will be considered. Please note this is a full time, permanent position in Austin, TX. This is not an internship.)