

TRUSTCORE[®]

illuminate the possibilities.

Associate Financial Planner

We are an independent, privately owned fee-based financial planning firm located in Brentwood, TN. We provide financial planning services to individuals, families and small business owners. Serving clients for more than 30 years, TrustCore is consistently ranked among the top wealth management firms in the U.S.

Responsibilities

- Participate in all aspects of the financial planning process, developing comprehensive financial plans with specific recommendations.
- Develop strategies unique to each client using critical thinking and in-depth analysis.
- Assist in client meeting preparation and participate in client meetings.
- Take action on completing follow-up tasks generated from client meetings, both internally and directly with clients.
- Be available to clients for ongoing needs and questions.
- Review client portfolio performance and rebalance as necessary.
- Contribute to the asset allocation process, investing across traditional publicly traded asset classes along with private alternative investments.
- Coordinate with outside professionals on behalf of clients (CPA, estate planning attorney, etc.).

Requirements

- Master's Degree with concentration in Financial Planning, Accounting or Finance. (Bachelor's with related experience will be considered.)
- CFP[®], CPA or CFA charterholder or progress towards one of these designations.
- Strong attention to detail and ability to work both independently and in a team setting.
- Strong verbal and written communication skills.
- Proficiency in Microsoft Excel and Word.
- Experience with financial planning software such as MoneyGuidePro, BNA Income Tax Planner and the Tamarac suite a plus.

Contact

- To apply, please submit a cover letter and resume to Megan Bader at megan.bader@trustcore.com.