Job Posting

Job ID: 31776809
Position Title: Financial Planning Assistant
Company Name: sherman wealth
Industry: Financial Planning
Job Function: Registered Financial Planning Associate
Entry Level: No
Job Type: Full-Time
Job ID: 31776809
Job Duration: Indefinite
Min Education: None
Min Experience: 1-2 Years
Required Travel: 10-25%
Salary: 40000.00
Salary - Type: Yearly Salary
Location(s): Gaithersburg, Maryland, 20878, United States

CONTACT INFORMATION
Contact Person: Brad Sherman
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Fax: --

Job Description

A fast growing, fee-only RIA in Gaithersburg, MD is seeking a highly energized and confident financial planning assistant who will thrive in a busy environment. Candidate must be extremely professional in appearance and manner, proactive, willing to accept direction, computer savvy and quick to learn new things. Superior communication skills (phone, computer, in-person) required.

Job Requirements

Administrative 35%

- Maintain the contact management system (Salesforce)
- Maintain files and records, which includes but is not limited to practice income and expense tracking
- Prepare correspondence and documents at the direction of the senior advisor in a technology-based environment
- Provide information to corporate office staff (forms, applications, special requests)
- Schedule and confirm appointments
- Document client calls
- Handle routine matters for clients' accounts - change names and addresses- Manage and resolve client service problems
- Review and update client information as needed for client review meetings on suite of technology services
- Complete meeting prep work including obtaining client account values, generating reports, etc. at direction of Senior advisor.
- Track and maintain Continuing Education and license renewals for Advisor
- Send Quarterly reports to clients through client portal
- Order Supplies for office
- Perform other allowable duties as assigned by the Client Service Manager or Advisor, as well as any duties a planning assistant may perform

Financial Planning Assistance 35%

- Prepare for the initial client interview by gathering materials needed
- Sort, copy and organize information gathered
- Enter basic data into planning tools
- Prepare charts, graphs, reports or other visual aids
- Process financial plan fee requests at direction of Senior Advisor
- Using guidelines, contact clients to obtain additional or missing information
- Gather materials to prepare for presentation meeting
- Verify that forms, applications, documents and other written materials are accurate and complete
- Prepare agreements and applications for the advisor/client signatures (docusign)

Social Media Marketing 20%
Maintaining and updating social media sites as well as advisory specific websites to increase our brand awareness, and drive internet traffic to increasing client activity within an assigned territory.

Utilize word of mouth marketing, internet marketing, and brand awareness.

Leverage social networks to strengthen relationships with existing clients and increase the number of impressions on potential clients.

Write/proof read/utilize blogging and social networking to maintain an up to date status with the industry.

Other marketing activities as assigned

 Coordinate seminars and plan client appreciation events

 Attend client / prospect events as needed

 Complete client appreciation tasks, as directed by the advisor

Technology 10%

Act as a technical resource, provide training and support to Advisor and Client Service Managers

Attend virtual trainings on pertinent issues for technology

Weekly review of missing items

Use to-do lists, calendars, computer software or other time management systems

Maintain files and records

Prepare correspondence and documents at the direction of the advisor in a technology-based environment

Perform other allowable duties as assigned by the advisor, as well as any duties a Senior Planning Assistant may perform

If you are interested in this position, please send your resume and cover letter to Brad Sherman at bsherman@shermanwealth.com