FINANCIAL PLANNING ANALYST
HOUSTON, TX OFFICE

ABOUT
THE MATHER GROUP

The Mather Group is one of the fastest-growing independent, fee-only registered investment advisory firms in the country, offering comprehensive financial planning services with clients' best interests in mind. We find the most cost-effective investment strategies, and clients pay only for our expert advice—no commissions, no product fees and no hidden fees.

OUR INDUTRY'S CHALLENGE
& OUR SOLUTION

Across our industry, only 3.8% of financial advisors are obligated to put their clients' best interests first. What the average investor doesn't realize is that most advisors hold brokerage licenses that allow them to put their firm's interests ahead of the client's. They aren't legally obligated to act in the client's best interest and can sell investment products for commissions. The Mather Group is a registered investment advisor with a fiduciary duty to our clients. That means we have a legal obligation to always act in their best interest. When clients chose TMG, there are no conflicts about where their money is held or how it's managed. What we're doing differently is educating investors on what the fiduciary responsibility really means, at a time when it's more important than ever.

SINCE OUR OPENING IN 2011
WE'VE MADE COMPELLING PROGRESS

- $1.1 Billion in assets under management
- Four offices in established markets: Chicago, Houston, Dallas and Atlanta
- 35 staff members and growing
- Named to Barron's Top Advisor List (2016, 2017)
- Named to Financial Times Top Advisers List (2016, 2017)

ONSITE
RESPONSIBILITIES

As a Financial Planning Analyst, you'll be responsible for the following:

- Build and maintain financial plans for Wealth Advisors
- Assist Wealth Advisors with and provide advice on investment management/cash flows/retirement planning strategies
- Prepare materials for client and prospect meetings
- Build proprietary portfolio cost and back-testing analyses
- Analyze annuities and insurance products for prospective clients
- Become competent in all firm technology platforms and business process
- Assist in account transition process
- Provide support to external Sales Advisors throughout sales process

CANDIDATE
REQUIREMENTS

- Bachelor's degree required, preferably with concentration in Finance, Accounting, Financial Planning or Business
- Graduate degree or professional designations (CFP, ChFC, CFA, or CPA) a plus
- If not currently held, must obtain mandatory industry licensure (Series 65) within three months of employment
- Must begin working towards CFP designation if not currently held
- Strong track record of achievement and meeting/exceeding ambitious targets
- Excellent verbal and written communication skills
- A motivated, self-started looking for a place to grow your career

The Mather Group is an equal opportunity employer and welcomes candidates from diverse backgrounds.

To apply for the position please submit a cover letter and resume to Amanda Muse, CFP® at a.muse@themathergroup.com.