Plancorp is seeking a Financial Planning Associate to join our growing team. We advocate for clients by proactively guiding them through all aspects of their financial lives. The firm provides comprehensive, holistic financial planning and investment advisory services for individuals, families, business owners, non-profit and institutional clients. We assist clients in articulating meaningful goals and attaining those goals through actions and strategies consistent with their specified values.

Who We Are:

- Nationally recognized fee-only RIA firm
- St. Louis based; in business for over 30 years
- AUM approx. $3.8 billion

Position Overview:

Financial Planning Associates are a key component of Plancorp's wealth management team and support the Wealth Manager's primary focus of analyzing a high net worth individual's financial situation and navigating them to their destination. This position requires critical thinking skills and curiosity, plus the ability to work independently, remain flexible to changing priorities, and anticipate firm needs and client questions. In this role you will…

- Collect, organize, and synthesize client information.
- Assess prospect or client's estate, retirement, tax planning and insurance needs.
- Construct and/or review all financial and retirement projections.
- Analyze client's information to assess estate, retirement, tax planning and insurance needs.
- Coordinate planning recommendations and implement with outside professionals.
- Respond appropriately to clients' questions and requests.
- Expand the client's trust in Plancorp by providing exemplary customer service.

What you bring:

- B.A. or B.S. degree from accredited four-year university; social sciences or business majors preferred.
- Commitment to acting in the clients' best interests in a fee-only financial planning environment.
- Respect for the confidentiality of client and corporate information.
- Strong analytical skills.
- Strong verbal and written communication skills.
- An understanding of the fundamentals of investing, including the characteristics and use of various investment securities, the mechanics of securities transactions, and the different types of investment accounts.
- Positive customer-focused attitude.
- Self-motivated to complete responsibilities with little or no supervision.

Why Work With Us?

You'll have the opportunity to learn from our team of experts, do work that touches people's lives, and be a part of our unique culture. We take great care of the people who take care of our clients. Comprehensive rewards package includes quarterly bonuses, daily catered lunch and free access to workout facility. We look forward to meeting you!