GREENSPRING ADVISORS
Corporate Retirement | Wealth Management

Position Description: Private Client Financial Associate

Location	Towson, MD
Purpose	At Greenspring, our Core Purpose is to "improve lives by helping people make better decisions for themselves and those who depend on them" and we are looking for talented people who share this passion. Working at Greenspring gives you the ability to: • Own Your Future with defined career paths and tools, coaching and support to help you create the future you want • Be Part of a Great Culture where you'll be a part of a team of people who are committee to each other's success • Make a Lasting Impact on the lives of our clients and through the camaraderie of working for a common goal with your peers The Financial Associate will work in conjunction with their assigned Lead Advisors and Financial Planners to determine the financial needs of clients and to provide advice and make recommendations on products and services that best meet their needs. Duties include assessing clients' assets, liabilities, cash flow, insurance coverage, tax status, and financial objectives to establish investment strategies. The candidate will be servicing the clients of Lead Advisors and Senior Financial Associates at the firm.
Responsibilities	• Ensures the highest standards for serving both clients and advisors. • Creates financial planning models by analyzing a client's cash flow, net worth, tax returns, investment statements and estate planning documents. • Prepares investment and financial planning reports for clients and prospective clients of the firm • Lives out and displays Greenspring's Core Values and Vision
Specific Measures of Success	• **Licensing**: obtains Series 65 license • **Credentials**: begins working towards CFP®, CFA or EA designation during tenure as a Financial Associate • Completes reports and reviews by assigned due date • Client **Net Promoter Score** (NPS) is 90 or higher • All client data is kept up-to-date in our client management system • Quickly responds to requests and resolves open tasks according to practice group standards

Job Requirements

Industry/Business Experience	No specific industry experience required, but degree in one of the majors below or 1-2 years of business experience is preferred.
Education	Bachelor's degree required. Degree in Financial Planning, Finance, Economics, Accounting or a related field preferred.
Skills and Knowledge	• Focus on client needs and customer service at all times • Detail-oriented and methodical • Follows up and follows through • Strong organizational skills with a proven ability to multi-task and manage multiple projects • A team player with good interpersonal skills and the ability to work collaboratively across departments, in addition to the ability to be highly relational with clients • Excellent oral and written communication skills, as well as presentation skills • Demonstrated analytical skills, problem-solving abilities, and attention to detail • Ability to excel in a fast-paced, changing environment • A self-starter who is assertive, proactive, independent, flexible and accommodating • Expert in most Microsoft Office applications. Comfortable learning and navigating new technology and software applications. Experience with Salesforce and/or Tamarac a major plus.
How to apply	Send your resume to careers@greenspringadvisors.com

Firm Profile

Our founding partners came up with the idea for Greenspring in 2002 while working for two of the world's largest brokerage firms. Thrust into a fast-paced and competitive sales culture with little more than a phone book, a desk and a phone, it quickly became clear that "clients" took a backseat to "commissions". But we had a different vision of what we wanted our careers to look like and how we wanted to work with our clients. So in 2004 we started out on our own with a handful of clients who believed in us and a different vision for the future where we existed to serve them and not the other way around. From the beginning, we left behind the lack of transparency and conflicts of interest that made it so difficult to serve our clients in the best way possible and fully embraced a fiduciary duty to clients, placing their interests before our own. We always believed that if we worked hard, aligned our interests with our clients and did the right thing for them, kept our promises, gave back to the community and hired great people the rest would take care of itself. Nearly 15 years later we have been incredibly fortunate to work with great clients, build an awesome team and give back hundreds of thousands of dollars to the communities in which we live and work through our Greenspring Charitable Fund and Greenspring Grant Program. At Greenspring, we have much to be grateful for and while a lot has changed since the beginning, one thing has remained constant – our clients come first.

Greenspring is consistently ranked as one of the country's leading independent advisory firms. We look to hire talented individuals with leadership potential, integrity, a sharp analytical mind, creativity, and the ability to work interdependently with others. We offer a competitive compensation package including:

- Health, Dental and Vision Insurance Offered
- Health Savings Accounts
- 401(k) Plan with employer match and discretionary profit sharing contributions
- Paid Leave & Vacation Allowance
- Paid Short-Term and Long-Term Disability Insurance
- Paid Group Life Insurance
- Annual professional development stipend for continuing education, courses, conference attendance, etc.
- Stand-up desks, dual computer monitors, monthly social events and volunteer hours

GREENSPRING ADVISORS- PRIVATE CLIENT CAREER PATH 2020

	Financial Associate		Financial Planner		Financial Advisor		Senior Financial Advisor		Partner	
Core Competencies	**Performance Objectives (KPIs)**	**Success Attributes**	**Performance Objectives (KPIs)**	**Success Attributes**	**Performance Objectives (KPIs)**	**Success Attributes**	**Performance Objectives (KPIs)**	**Success Attributes**	**Performance Objectives (KPIs)**	**Success Attributes**
Technical Skills	• Obtains Series 65 license • Presents GA captstone • Attends DFA Introductory Conference • Mastery of BNA, MGP and Tamarac programs • Begins CFP® designation	• Curious • Constant Learning • Creative Problem Solving • Responsive • Anticipates Clients Needs • Self-Starter • Bias Towards Action • Meets or Exceeds Deadlines	• Financial planning topics move from theory to practice • Attends industry conference/study groups • Develops some basic content creation • Niche identification • Obtains CFP® designation	All attributes of a Senior Financial Associate, plus; • Communication of Complex Topics • Strong Oral and Written Communication Skills • Confidence • Mentoring Associates	• Continued niche expertise • Attends industry conference or local education opportunities	All attributes of a Senior Financial Planner, plus; • Active Listening • Mentoring of Financial Planners • Development of Delegation and Supervision Skills	• Firm "go-to" on a specific topic • Content creation- blog, webinar, speaking at least once a quarter	All attributes of a Financial Advisor, plus; • Leadership to Clients and Others • Assist in Training Team Members	• Firm expert on a specific topic	All attributes of a Senior Financial Advisor, plus; • Communicating Greenspring's Story • Being a Brand Ambassador • Exemplify GA Core Values • Establish Third-Party Partnerships
Client Service	• Create financial plans for team's clients • Create tax projections for team's clients • Prepare client annual review reports		• Leads all or a portion of client meetings • Needs little supervision to manage relationships		• NPS Score of 90 or higher • Clients without contact is less than 5% • Client retention rate of 98% or higher		• NPS Score of 90 or higher • Clients without contact is less than 5% • Client retention rate of 98% or higher		• NPS Score of 90 or higher • Clients without contact is less than 5% • Client retention rate of 98% or higher	
Business Development and Relationship Management	• Perform at least 1 business activity per month • Participates in monthly role playing		• Perform at least 2 business development activities per month • Can move someone from prospect to client • Identify 10-20 clients and >$100K of revenue to be active lead on		• New business goal of $50K of sourced revenue per year • Completion of personal marketing plan		• Sourced revenue goal of $75K/yr • Manage >$300K in client revenue • Completion of personal marketing plan • Works with at least 10 clients, and no client represents more than 50% of revenue		• Sourced revenue goal of $100K/yr • Manage >$750K in client revenue • Total Sourced revenue >$375K • Completion of personal marketing plan • Works with at least 20 clients, and no client represents more than 50% of revenue	