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Registered Investment Advisor

JLFranklin
WEALTH PLANNING

SUPPORT ADVISOR (ENTRY-LEVEL)

JLFranklin Wealth Planning is a small, growing, Registered Investment Advisor (RIA) firm with headquarters in beautiful **Marin County**, CA, just 10 miles north of the Golden Gate Bridge, and a 30-minute ferry ride from downtown San Francisco. We offer a stimulating, fast-paced environment with long-term growth potential. After three months of training in our office, you may have the option to work remotely, or you can remain as part of our in-house team.

Compensation is competitive and benefits include medical insurance, 401(k) and profit sharing, and paid time off. We encourage professional development by providing reimbursement for classes and conferences. Casual dress code, weekly staff lunch, and equity ownership potential are added perks.

JLFranklin Wealth Planning provides comprehensive financial planning, investment management, and tax planning on a fee-only basis. The owner of the firm has more than 25 years of experience, a tax background, and a roster of tech and entrepreneurial clients. We encourage you to visit JLFwealth.com before you apply to get an understanding of what we do and how we operate.

SUMMARY OF RESPONSIBILITIES

The Support Advisor is a challenging and rewarding position with substantial room to grow. As a member of a female-led team, you will make a positive impact in people's lives, gain exposure to a fast-paced small business environment, and have the opportunity to participate in a variety of projects. A Support Advisor at JLFranklin Wealth Planning assists Associate Wealth Managers and Lead Advisors with all aspects of wealth management, including: solving client requests, data gathering and analysis, financial planning and portfolio reviews, meeting preparation, drafting trades, researching investments, client communication, client account maintenance, and implementation of recommendations.

The ideal candidate will have some financial services experience (including college coursework), a basic understanding of financial planning, and a thirst to learn and grow as a financial professional. All client relationships are handled on a team basis, and the Support Advisor is a key member of the team.

To find out more about our career path for Wealth Advisors, please review this PDF.

DESIRED SKILLS

• Analytical skills to prepare and analyze client financial statements, plans, and investments
• Working knowledge of Microsoft Office Suite (Word, Excel, and PowerPoint) using a Windows-based computer
• Interest in mastering financial planning, client relationship management (CRM), and portfolio

management software
• Strong communication skills with the ability to interact with our Wealth Advisors and high net-worth clients, verbally and in writing
• The ability to manage time effectively and prioritize projects to ensure on-time completion
• A highly collegial and collaborative work style; able to work well with all members of the team and pitch in on all aspects of serving our clients
• Strong work ethic and eagerness to "roll up your sleeves" to get things accomplished for the client and the team
• A high level of professionalism

REQUIRED QUALIFICATIONS AND SKILLS
• Bachelor's degree in Financial Planning or at least 5 Financial Planning classes
• Acute attention to detail and accuracy
• Excellent written and verbal communication skills
• Uncompromising ethical standards
• Desire and ability to work successfully and collaboratively in a small company environment
• A compassionate, approachable, friendly personality
• A client-comes-first attitude

LOCATION
Larkspur, California (or remote after 3 months of in-office training)

HOW TO APPLY
Please visit the Job Opportunities page of our website at JLFwealth.com to apply and submit a cover letter and your resume. We prefer PDF attachments. Unfortunately, we are unable to accept direct calls or emails about this position. Thank you in advance for your interest!