# Financial Planning Analyst (Campus)

Job Location(s)US-TX-Dallas

**Dept.**

Southwest Region Counseling

**Category**

Accounting/Finance

**Job ID**

2021-SWR-FP-Campus

## Overview

The *Financial Planning Analyst* is for students who have an interest in one or more of Ayco's financial counseling businesses:

• **Coaching -** Management and navigation of personal finances, life events and company benefits delivered through a digital platform with one-on-one guidance from a coach.
• **Planning** - Advice, investment services and guided implementation of a personal financial plan for those with increasingly complex finances delivered through a dedicated advisor and digital platform.
• **Counseling** - Proactive financial counseling, full-service implementation, including tax preparation and investments, to address complexities of executives, entrepreneurs and high net worth individuals.
• **Family Office -** Sophisticated solutions to streamline the intricate financial lives of ultra-high net worth families, through comprehensive coordination, advanced risk management, investment services and legacy preservation strategies.

**Applications are now open and interviews will take place on a rolling basis. We do ask that you only apply to one position at a time to ensure the best candidate experience. Our recruiters will review your application and may submit you to other positions based on your skillset.**

Ayco is an industry pioneer and preeminent leader of company-sponsored financial planning services. We believe companies best serve their stakeholders and the greater economy when their employees' financial lives are clear, understood and in their own control. For nearly 50 years, we've aspired to deliver a more productive and engaged workforce to our clients by providing their employees a path to financial well-being through holistic and personalized services tailored for each stage of the career cycle—from entry-level to C-suite.

## Responsibilities

• Work one-on-one with individual and/or corporate clients providing comprehensive personal financial planning, investment planning and tax services to corporate employees, executives and/or other high-net-worth individuals
• Prepare various reports for clients in the areas of cash flow planning, income tax projections, investment allocation, investment performance, estate flowcharts, etc.
• Extensive telephone contact and/or face-to-face interaction with clients, and their outside advisors, to obtain information and provide advice

• Prepare income and gift tax returns for clients
• Assist in financial planning projects and analysis

## Qualifications

**• Must be in pursuit of a degree equivalent to a Bachelor's or above graduating between December 2020 – May 2021**

• SIE, Series 7 and Series 66 preferred; required within 1 year of hire
• Working knowledge of Microsoft products such as Excel, Word, PowerPoint, and Outlook
• Strong organizational and multitasking skills
• Excellent written and verbal communication skills
• Ability to maintain a high level of confidentiality
• Enthusiastic and positive approach to problem-solving and client service
• Proven track record with cross-training, task-sharing and mutually supportive teamwork
• Must be able to be innovative, pro-actively manage time and follow through to complete tasks