Financial Planning Resident

The Position:
We currently have an opening in our three-year Financial Planning Residency Program starting in June 2018. We seek a financial planner who wants to grow and learn the necessary skills to become an integrated financial planner. The Financial Planning Residents will leave our firm with the experience needed to join an established firm. The resident will acquire all the skills expected of other KFG associates.

The primary skill we seek for this position is the ability to manage client relationships and develop financial plans. This includes a keen interest in relational skills, self development, and the analysis and application of financial data. We have a team approach to financial planning, so all employees work with the same clients.

Responsibilities:
- Work with clients in a technical, financial planning role
- Demonstrate good social, communication and non-verbal listening skills
- Developing meeting agendas, financial plans, and investment policy statements
- Work collaboratively with team members in an ensemble practice
- Confidently deliver advice to clients via conference call or face-to-face meetings
- Learn to facilitate the resolution of financial behavioral problems
- Structure advice and counseling around the big strategic financial picture
- Prepare, coordinate and follow through on any needed communication clients
- Maintain high ethical standards, confidentiality and professionalism at all times

Qualifications:
- Has CFP® designation or a BA or MS in financial planning and will sit for the CFP® examination within four months.
- Able to analyze data and advanced Excel skills
- Good intuitive thinking skills, practical, logical
- Strong conceptual skills, able to see the big picture
- Confident working with successful, high net worth clients
- Strong interpersonal skills, passionate about financial coaching and counseling
- Ability to think critically, identify and find solutions to client's need
- Able to meet deadlines and handle client requests without drama
- Will address their counter-transference issues around money
- Drawn to a Holacracy, a non-hierarchal organizational operating system
- Embraces Non-Violent Communication, GTD, and self-development
- An ability to quickly grasp and discuss complex planning issues
- Has or willing to obtain a degree in counseling or become an ICF Master Coach
- Has CFP® designation or a BA or MS in financial planning

Benefits:
- Incentive based gross revenue bonus program
- 401K Plan and Profit Sharing Plan

- Technology allowance
- Paid membership fees for industry association

The Company:
We are a growing 35-year old, fee-only integrated financial planning firm. We offer an unique team-oriented culture, a reputation for excellence, established clients and growth potential to help you reach your personal and career goals. Our company has 100 clients located throughout the US. Our founder, Rick Kahler, is a noted speaker, author, and columnist on financial planning and financial therapy.

Our employees are as important as our clients, and we work to provide both with a collaborative atmosphere and learning environment. We value our employees and we take pride in recognizing and supporting their outstanding talents and efforts. We empower our employees through a unique governance structure (Holacracy) where each person has responsibility and control over decisions as they relate to the role they play within our company. We commit ourselves to the delivery of a superior quality of services based on a foundation of honesty, integrity and ethical treatment.

The core purpose of our company is to transform the financial and emotional well-being of people. This includes our clients and ourselves.

Our core values are authenticity, unbiased advocacy, well-being, and continuous improvement. We put our values into action by:

1. Putting clients first
2. Guiding people to reach a destination in an unfamiliar area
3. Giving sound advice and creative solutions
4. Constantly educating ourselves
5. Personally practicing what we preach
6. Taking clients only where we have gone ourselves
7. Being serial innovators
8. Taking personal responsibility for our actions and contributions

The City:

Pursuing a career in financial planning in Rapid City, South Dakota means you will enjoy the best of all worlds; great quality of life, low personal taxes, and a low cost of living.

Rapid City has an outstanding atmospheric and cultural climate, making it one of the best kept secrets in the US.

Nestled at the foot of the beautiful Black Hills, Rapid City is the perfect location for those who love the outdoors. In 2015 it was rated the #16th best city to live in by Livability.com, #3 top town for sportsmen by Outdoor Life magazine in 2011 and one of the top 25 cities to raise an outdoor kid by Backpacker Magazine. Rapid City is tied with Ft. Meyers, FL for having the best air quality of any city in the United States.

With summer and winter skiing, rock-climbing, hunting, fishing, boating, and more trails than a person could hike in their lifetime all within an hour's drive, Rapid City is the perfect location for those who love the outdoors.

Our residents enjoy the many tax and business advantages of doing business here. And when the cost of doing business is low, so is the cost of living. Consider that South Dakota has:

- **NO** Corporate Income Tax
- **NO** Personal Income Tax
- **NO** Personal Property Tax
- **NO** Inventory Tax
- Low cost of living, .81 of the national average
- The 2nd lowest state per capita taxes in the nation
- Fourth lowest overall crime rate in the nation
- An average commute time of 13.8 minutes
- Number one high school graduation rate in the nation

Rapid City features a steppe climate (Köppen *BSk*). Its location makes its climate unlike both the higher elevations of the Black Hills and the Great Plains to the east. It is characterized by long arid summers and mild, dry winters, with short but distinct spring and autumn seasons.

No phone calls please. If interested, please send resume and cover letter to rick@kahlerfinancial.com.

In your cover letter please tell us:

1. Why do you want to live in Rapid City, SD for at least 24 months?
2. What attracts you to Kahler Financial Group?
3. The core purpose of our company is to transform the financial and emotional well-being of people. What does that mean?
4. What will you bring to Kahler Financial Group?
5. What do you need most from Kahler Financial Group?
6. What does "Financial planning from the inside out" mean to you in your life?

We are an equal opportunity employer. Selected candidate may be required to pass a drug test and background check and may be asked to complete personality and/or competency tests.