Junior Financial Planner

The Position:

We are currently seeking a Junior Financial Planner with strong analytical skills and an interest in personal and professional development to join our team. We have an ensemble approach to financial planning, so all employees work with many of the same clients.

Our firm specialties include comprehensive wealth management, financial life planning, asset protection strategies, real estate, and business planning. Our average client is a high-net-worth business owner, professional, or retiree. Our clients are spread throughout the United States.

The primary skill we seek for this position is the ability to develop complex financial plans along with the interest and ability to develop high emotional intelligence and extraordinary client facing skills. This includes a keen interest and love for the analysis and application of financial data and a desire to apply that knowledge in facilitating behavioral change in clients.

Responsibilities:

- Work with high net worth clients in a technical financial planning role
- Structure financial advice around the client's strategic financial picture
- Develop meeting agendas and generate detailed financial plans
- Act as liaison and coordinator between senior planners and operations staff
- Develop exquisite coaching and listening skills
- Confidently deliver advice to clients via virtual or face-to-face meetings
- Work collaboratively with senior planners and team members
- Maintain high ethical standards, confidentiality, and professionalism at all times

Qualifications:

- Energized by the analysis of technical data and devising sophisticated planning solutions
- Has an "owner's attitude"
- Is a quick learner
- Has strong analytical skills using MS Office Excel
- Has a desire to become more aware, present, and conscious
- Does not view themselves as above doing any task or accountability
- Takes personal responsibility and keeps agreements
- Has good self-management skills and uses the "Getting Things Done" system
- Possesses strong analytical skills and is able to see the big picture and apply critical thinking
- Is open to applying the principles of Non-violent Communication in the workplace
- Able to meet deadlines (Often demonstrated as a Meyers Briggs "J")
- Is a CFP® Practitioner or will be sitting for the CFP® exam soon
- Has 1 – 3 years prior work experience as a financial planner, preferably in a fee-only planning firm; or is a recent graduate of a college financial planning program

- Willing to temporarily or fully relocate to Rapid City, SD.

Benefits:

- 401K Plan and profit sharing plan
- Paid holidays and paid time off
- Flexible work schedules
- Technology and fitness allowances
- Education allowance
- Paid membership fees for industry associations
- Salary range $60,000 - $80,000 commensurate with experience

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

In your cover letter please tell us:

- What attracts you to Kahler Financial Group?
- What you would bring to Kahler Financial Group?
- What do you need most from Kahler Financial Group?
- What salary range you expect to receive?
- What would you find attractive about moving to Rapid City?

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.

The City:

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. 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.