

Job Description **Financial Planner**

Opportunity Overview

The Financial Planner works as part of a team to prepare financial plans and provide service to clients.

Financial Planner Responsibilities & Duties

- Prepare and update financial plans using MoneyguidePro, Morningstar, Tax Tools, and Microsoft Office
- Perform in-depth tax and distribution planning for retirement age clients
- Create and maintain high credibility relationships
- Rebalance client portfolios using TRX and place trades using TD Veo platform
- Follow-up with clients on action items, planning objectives, and client-provided data
- Participate in client meetings and document meeting discussions
- Collaborate with other members of the planning team on strategies
- Document assumptions and calculations in the Firm's Client Relationship Management software
- Special projects as needed to enhance financial planning delivery and consistency

Financial Planner Requirements

- Certified Financial Planner™ professional preferred. Candidates for CFP® certification will be considered for an Associate role while working towards the experience requirement for certification.
- Two+ years' professional experience.
- Friendly, confident, sincere approach to interpersonal relationships with high empathy.
- Outstanding written and verbal communication skills.
- Excellent computer skills including Microsoft Office and Internet Explorer. Experience in Morningstar Office, MoneyguidePro, TRX, TD Ameritrade Veo, and Tax Tools is a plus.
- Accuracy, reasonable speed, and attention to detail for record keeping and working with client data.
- Highest level of ethical responsibility and respect for client privacy.
- Desire and willingness to take on additional responsibilities for both personal development and firm growth.
- Comfortable in a deadline-oriented environment.
- Availability for limited Saturday appointment times to accommodate client schedules

- Commitment to core values of best interest of the client, respect, competence, professionalism, accessibility, and work-life balance.

About Keener Financial Planning

Keener Financial Planning is a fee-only financial planning and SEC-registered investment advisory firm with a primary office in Keller, TX and a satellite office in Dallas. As members of the Garrett Planning Network and NAPFA, our mission is to provide objective, expert financial advice tailored to each client's unique situation. With accessibility as one of our core values, services range from a la carte financial advice on an hourly or flat-fee basis to comprehensive financial planning and investment management.

We have a fun, supportive work environment. And yet, it's not easy. We work really hard to deliver an extremely high quality, consistent financial planning experience for each client. We served about 285 client households last year with a team of 7 people so we have multiple deadlines and deliverables every single week.

We are a growing firm. We will continue providing highly personalized service while scaling our business model with efficient processes, smart use of technology, and extraordinary people.

Financial Planner Position Details

The ideal candidate will thrive in a supporting advisor role by producing high quality financial plans, providing detailed follow-up, and developing strong client relationships. This is a new position working primarily with ongoing retainer clients, and may also include doing some as-needed hourly financial planning. The ideal candidate will also be attracted to potential future firm ownership opportunities.

Competitive salary based on skills and experience plus quarterly bonus potential. Company paid health, dental, vision, life insurance, and holidays. 100% 401(k) match up to 6% of pay. After 90 days, employees are also eligible for paid vacation time.

How to Apply

Send your resume and cover letter to Director of Operations Kelli Hinton, kelli@keenerfinancial.com.