Position: Financial Planning Analyst
Available: Immediately
Deadline: Until Position is Filled
Contact: Brent Zackon

RTD Financial Advisors, Inc. is a Financial Life Planning firm, headquartered in Center City, Philadelphia. We are a progressively growing firm, offering an exciting place to work and a well-defined career path. We strive for a team-oriented culture with a commitment to the highest levels of ethics and client service.

We are seeking a Financial Planning Analyst in our Cherry Hill, New Jersey office. This is an entry-level position, focused on learning about and embracing the financial life planning process. Our Financial Planning Career Track offers the right candidate an amazing opportunity to develop a career, guiding clients through important decisions, while shaping the future of a highly committed and cutting-edge financial planning firm. Candidates should *passionately* believe that client interests always come first.

Key Qualifications and Characteristics

- Seeking a defined career path in financial planning
- Interested in pursuing the CFP® designation (having satisfied the full coursework from a Certified Financial Planner™ program is a plus)
- B.A. or B.S. degree from an accredited four-year university
- Strong verbal and written communication skills
- Very organized, with acute attention to detail
- Self-starter, problem solver and goal-oriented team player with a 'no job is beneath me' attitude
- Genuinely caring by nature, empathetic and a good listener
- Demonstrates curiosity and confidence when working with others

Responsibilities

- Assist in all aspects of the financial planning process
- Support planning team in maintaining client relationships
- Collaborate with planning team in preparation for client meetings
- Attend and participate in client meetings, listening, observing, taking notes and preparing follow up communication for review
- Input notes and action items into client relationship management system and monitor pending action items, assisting in their completion
- Update financial planning projections within eMoney Advisor
- Assist in gathering client data, entering into client relationship management system
- Receive inbound client phone calls and emails, either addressing their needs or directing them to the appropriate team member
- Communicate with clients, following up on action items and scheduling meetings and conference calls, if needed
- Participate in firm's various committees in pursuit of the company's goals
- Enthusiastically participate in, and volunteer for, professional associations such as FPA and NAPFA

Salary and Benefits

- Competitive salary with bonus opportunities
- Annual incentive based on merit and the profitability of the firm
- Health and dental insurance (50% company-paid)
- Group long-term disability insurance (100% company-paid)

- 401(k) plan with discretionary Profit Sharing contribution (historically 2%-3% of annual base salary)
- Continuing education allowance
- Formalized professional development program
- Generous paid time off and holiday schedule

To Apply

Please send your cover letter, resume and answers to the following short essay questions (500 word maximum per question) to careers@rtdfinancial.com. All documents should be combined into one file and submitted in PDF format with the filename containing your first and last name - **No Phone Calls!**

1. Why would you like to work for RTD Financial?
2. What would you bring to RTD Financial that is unique?
3. What does it mean to you to put your client's interest first?