**Capstone Financial Advisors, Inc.**

**Personal Financial Planning Associate**

**Position Summary**

The Personal Financial Planning Associate is a professional position that supports the Advisor directly in servicing existing and potential clients. Requirements include a bachelor’s degree with a strong interest in working in a team environment and fostering client relationships. This is a strategic role within the firm and provides an important opportunity in the development of future advisors. Qualified candidates will be detail oriented, highly technical, and possess a high degree of follow-through.

**Duties and Responsibilities**

* Support the Advisor in the development of client comprehensive financial plans while exhibiting competency in a multitude of areas, including, cash management, employee benefits, estate planning, income tax planning, insurance, investments and retirement planning
* Coordinate and prepare all materials to be used during client meetings
* Execute client trades as directed and overseen by the Advisor
* Responsible for meeting follow-up (logging, tracking and completing client open items) and communication with clients (phone, email, etc.), as directed by the Advisor, on the development, implementation and monitoring of financial plans
* Preparation of client tax returns
* Attend client meetings in a technical, supportive and learning role
* Responsible for consistently and effectively executing the firm’s processes and operational duties in a compliant manner
* Support the firm’s quarterly billing process

**Qualifications**

* Possess the ability to thrive in a highly technical environment
* A self-starter, takes accountability, and committed to personal development
* Possesses good judgement; able to gather, analyze and evaluate information in support of effective decision-making
* Detail-oriented, accurate, organized and able to effectively manage time
* Strong ability and interest in fostering relationships (clients and coworkers)
* Excellent interpersonal skills
* Possesses high integrity, positive attitude and team orientation
* Experience with financial planning software applications
* A desire to work for a fee-only comprehensive financial planning firm

**Experience and Education**

* Two years plus of comprehensive financial planning experience preferred
* Bachelor’s degree
* GPA ≥ 3.25
* CFP ® designation, or in process/plans to obtain

**Contact: Bill Murphy at bmurphy@capstone-advisors.com**

**Capstone Financial Advisors, Inc. is an Equal Opportunity Employer**