

RonaldBlueTrust™

Financial Planner

*This position is located at our Houston, TX office which is located at:
952 Echo Lane, Suite 190, Houston, TX 77024*

About Us

With nationwide capabilities, Ronald Blue Trust provides wealth management strategies and trust services based on biblical principles to help clients make wise financial decisions, live generously, and leave a lasting legacy. With over \$8 billion of assets under management and advisement and a network of 13 branch offices, we serve over 8,000 clients* in all 50 states through four distinct divisions and offer services across the wealth spectrum in these key areas:

- Financial, retirement, estate, and trust planning
- Investment management and solutions
- Charitable giving strategies
- Personal trust and estate settlement services
- Bill paying services
- Family office services
- Business consulting services
- Institutional client services

** As of 12/31/17 and subject to change.*

Position Overview

We are currently seeking a **Financial Planner** in our **Houston, TX** office who is able to communicate effectively with clients and co-workers, analyze confidential client financial information, and integrate biblical principles and technical expertise into customized financial plans to help clients make wise financial decisions, live generously, and leave meaningful legacies.

The Financial Planner position covers a wide range of responsibilities including but not limited to:

- Developing high quality, accurate, attractive, and professional reports and presentations that integrate a biblical worldview into financial recommendations
- Facilitating client meetings, recording meeting notes, following up regarding meetings, and responding to client and outside advisor inquiries

- Performing investment management tasks such as trading, tax loss harvesting, rebalancing, account review, and generating Quarterly Investment Reports
- Assisting with tax and financial planning issues related to cash, securities, other property, gifting opportunities, bonus payments, and estimating tax withholding amounts
- Actively working to increase knowledge of biblical financial principles and scripture memory verses to deliver client service in a manner consistent with Ronald Blue Trust's mission
- Exhibiting technical knowledge and competency in education funding, debt management, income tax estimation and minimization, charitable giving, cash flow, retirement, insurance, and estate planning
- Demonstrating computer literacy and knowledge of specialized office programs and demonstrating competency in utilizing software applications

Desired Qualities and Skills

The successful candidate for the Financial Planner position will possess the following:

- Aptitude to build and leverage networks to establish long-term client relationships
- Desire to serve clients and co-workers with excellence
- Aptitude and passion for learning
- Proven technical, analytical, and problem solving skills
- Proactive planning and responsiveness to urgent needs
- Capability to excel in a team environment
- Strong communication skills, both verbal and written
- Solid understanding of investment markets and products
- Strong organization skills and systems acumen
- Strong business mathematical skills and keen attention to detail
- Personal integrity and ability to discreetly handle confidential data
- Ability to prioritize and complete multiple time-sensitive tasks
- Proficiency in Microsoft Office with a high level of expertise in MS Excel

This position requires a Bachelor's degree, preferably related to financial services, and a minimum of three (3) years' prior financial planning and/or financial service experience. Additional education and credentials are a plus, such as work towards or completion of an MBA, the Certified Public Accountant designation, and/or the CERTIFIED FINANCIAL PLANNER® designation. Priority will be given to local candidates.

How to Apply

Please visit the Careers page of www.ronblue.com to submit your resume and cover letter. Prior to applying for this position, please visit www.ronblue.com and review it thoroughly. Should you decide to apply, make sure to include a cover letter which includes your answers to all of the questions requested on the application page. **NOTE:** To be considered a candidate for our firm you **MUST** provide a cover letter. Once you have applied for this position, please add ronblue.com to your email's spam filter whitelist/safe senders list. This setting is often found in your email account under Mail / Options. This will ensure that any correspondence from us will be received by your email inbox.