Financial Planner

Full-time position in Austin, TX or Dallas, TX for financial planner with 3-5 years' experience preparing and presenting financial plans to wealth management clients.

Join us to help others achieve their financial and life goals by using your analytical, relationship, organizational and leadership skills.

> **Financial Planning** - You will work independently as well as partner with senior financial advisors in the financial planning process, frequently taking the lead on client matters.
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> **Special Project Support –** You will help us continually enhance our client services and business results through participation and leadership in our strategic planning initiatives.

Expect a fast-paced environment in a growing organization that continuously evaluates and evolves its best practices. Count on company support and encouragement for ongoing formal professional development.

EXPERIENCE & EDUCATION REQUIRED

- **3-5 years' experience in similar position**
  - Developing and presenting financial plans
    - CERTIFIED FINANCIAL PLANNER™ professional
    - Series 65 or equivalent securities license
  - Cultivating client relationships
  - Demonstrating leadership
    - Teams and/or projects
- **Bachelor's Degree**

REQUIRED ABILITIES

- Work well independently and with teams
- Build relationships internally and with clients
- Listen and ask meaningful questions to clients and team members
- Gather and analyze data and present actionable financial plan to clients
- Organize thoughts for written communications using proper grammar
- Manage and follow-up on details
- Solve problems
- Adapt to new technology as new systems are implemented
  (Currently utilized technologies include AdvisorView, Tamarac CRM, Riskalyze, and eMoney)
- Lead projects and teams

PERSONALITY THAT FITS OUR TEAM

- High integrity
- Sense of humor

- Strong work ethic
- Giving and gracious

VALUE YOU WILL DELIVER TO CLIENTS

- **Solutions.** After gathering client data and using state-of-the-art software to analyze the data, you will make recommendations addressing identified client needs.
- **Motivation.** Using facts and emotional intelligence, you will work to move clients to take needed action.
- **Peace of mind.** By monitoring to ensure client requests are processed promptly and accurately, you will help our clients rest easy as we oversee their financial details.
- **Relationships.** Our relationships with our clients are special, often categorized as friendships. Your role will provide you with regular direct interactions with clients by email, phone and in person.

IMPACT YOU CAN MAKE AT OUR COMPANY

- **Bring us new ideas.** We support ongoing professional development, so you can then bring that learning back to the organization.
- **Sustain our positive company culture**. You will join us in our weekly kick-off meeting where we share celebrations, appreciations and need-to-know information.
- **Shape our company strategy.** We will ask for your ideas and feedback in our annual strategic planning process as well as in many other meetings.

COMPANY OVERVIEW

As one of the nation's first fee-only wealth management firms, we are dedicated to delivering ethical advice to our clients with excellent customer service. Our firm is growing and we are expanding into new service areas for our clients.

Our team is comprised of professionals holding some of the highest credentials in the industry. Employees work independently as well as in teams. Because of our growth, team members are expected to learn about other areas of the business and assist as needed to graciously serve our clients.

We have been a finalist for the *Austin Business Journal's* "Best Place to Work in Austin" prize every year since 2004, and we have won the small business category three times. Expect to have fun while getting the job done.

Benefits include:

- medical and disability insurance
- 401(k) plan
- stock options
- relocation expenses, under select circumstances
- support for ongoing professional development

TO APPLY

No phone calls, please. Email resume to mnewhouse@slaughterinvest.com with a cover letter telling us why you think you are a good candidate for this position. If available, include any personality assessment reports (ex: Financial DNA, StrengthsQuest, DiSC, MBTI) profiles that might help us better your preferences, needs and/or work style.