
Financial Planner

Created with an entrepreneurial spirit, Wisniewski Wealth Management is a wealth management, financial planning, and tax advisory firm located in Dallas, TX. Wisniewski Wealth Management delivers holistic financial solutions to help clients achieve their goals. We are seeking an individual that has achieved, or plans to achieve the CFP certification to join our team located in Dallas, TX. The individual would serve in a support role to the lead advisor. However, if appropriate, there would be an immediate opportunity to develop business, in addition to supporting the lead advisor and being an integral part of the service team.

Initial Key Areas of Responsibility

- Assist financial advisors in preparing for client meetings
- Assist financial advisors with prospective clients by gathering data, reviewing portfolios, creating financial plans, identifying advanced planning opportunities and creating financial management plans.
- Implementing financial planning recommendations.
- Assist financial advisors with tax preparation and tax planning.
- Work with all software programs the firm utilizes.
- Support administrative team as needed.
- Completing ad-hoc firm projects.

Potential Future Key Areas of Responsibility

- Assist with trading and re-balancing of client investment accounts
- Deliver multidisciplinary financial planning advice for high net-worth clientele
- Develop and manage on-going client relationships
- Delegate appropriate tasks to supporting team members
- Provide input on strategic plan and direction of the firm
- Business development

Requirements

- Extremely organized, with a strong attention to detail
- Knowledge of Microsoft Office applications (Excel, Word, Outlook)
- Completed, or on track to complete, a B.A. or B.S. degree preferably in Financial Planning, Finance, Accounting or Economics
- Strong financial and analytical skills
- Strong persuasive and interpersonal skills
- Ability to identify, meet and follow through with client needs and requirements
- Must be a self-starter, problem solver and a goal-oriented team player with a 'no job is beneath me' attitude
- Able to work independently and keep team lead aware of progress and hurdles
- Show curiosity and confidence when dealing with clients and advisory team
- Positive attitude and punctuality
- If you are looking for a comfortable job at a large firm where the pace is steady, DO NOT apply

If interested, please send resume and cover letter to s.wisniewski@wi-wm.com