

Associate Planner – TrustCore

Nashville, TN

Position Overview

We are seeking applicants for an opening as an Associate Planner (AP) on a successful financial-planning team. AP will participate in all aspects of the financial-planning process and develop comprehensive financial plans with specific recommendations. AP will serve as “second chair” in client meetings along with a Senior Planner. AP will be called upon to develop strategies unique to each client using critical thinking and in-depth analysis. AP will have responsibility for client-meeting preparation as well as follow-up tasks internally and directly with clients.

- Bachelor’s degree in financial planning, accounting, or finance. Master’s degree preferred.
- CFP, CPA, or CFA charterholder or progress towards one of these designations.
- Strong attention to detail and ability to work independently and in a team setting.
- Excellent verbal and written communication skills.
- Proficiency with Microsoft Office365.
- Experience with financial software such as MoneyGuidePro and Tamarac a plus, as well as knowledge of Charles Schwab custodial platform technology.

About TrustCore

Based in Brentwood, TN (suburb of Nashville), TrustCore financial planners can help you chart a clear course for your financial future. The firm is privately owned and operates independently from any other financial services company. Serving clients since 1984, TrustCore is consistently ranked among the top wealth management firms in the U.S.

If you are interested in this position, please send your resumes to: Gary.Dean@trustcore.com