



HORST&GRABEN

WEALTH MANAGEMENT

HORSTANDGRABENWEALTH.COM 3 Centerpointe Drive, Suite 410 | Lake Oswego, OR 97035 TEL (503) 342-8900 | (833) 446-7784

Horst & Graben Wealth Management, outside of Portland, OR, seeks a recent or upcoming graduate of a financial planning program to take primary ownership of our financial planning process and serve as a main point of contact for advisory clients. This is a permanent, on-site position (with COVID guidelines observed) and remote work applications will not be considered. The ideal start date would be sometime in January but can be flexible.

The ideal candidate is detail-oriented, an independent worker, creative with creating and updating processes, and comfortable with the financial planning process and utilizing planning software. Candidates must have completed CFP-accredited financial planning coursework. A main goal of this position is for the employee to gain their CFP designation within a year of their start date, and H&G will pay for study materials and the exam itself.

Primary duties of the position will include:

- Plan and implement a robust financial planning process spanning information gathering, plan presentation, and regular updates.
- Prepare preliminary analysis, financial planning and initial product solutions for advisor review and use in client meetings. Help to develop portfolio recommendations that fit the client's risk tolerance and time frame.
- Generate portfolio and wealth management presentations including charts, graphs, tables, and other visual aids to be used in implementation meetings with clients and marketing presentations for prospective clients. Assist financial advisors with presentations to other advisors and clients on specific topics related to financial planning and illustrating related business development strategies.
- Review and update client information as needed for client meetings. Attend and participate in client meetings as appropriate.
- Coordinate team meetings: set meeting agenda, disseminate resulting tasks and timeline for completion.

Our benefits include:

- Annual paid time off: 8 holidays, 40 hours sick leave, 16 hours personal leave, 10 days of vacation
- 401(k) eligibility after one year, 100% match on first 3% and 50% match on next 2%
- Comprehensive medical, dental, and vision insurance, 100% of employee premiums employer-paid
- Relocation reimbursement will be considered for out-of-state candidates

Please upload resumes to Handshake or email to megan@horstandgrabenwealth.com.