

**We are** a boutique independent RIA in search of an **Associate Financial Planner**. The right candidate will serve as a primary collaborator with the lead advisor and owner and support client relationships with financial plan creation and updates as well as client support. There is long-term growth potential and equity shareholder potential in this role, and the ideal candidate desires to be a part of a growing team working in a small, entrepreneurial firm with direct impact on the business growth.

**Responsibilities:**

* Build and maintain client relationships in partnership with lead advisor.
* Attend meetings held by lead advisor with clients and prospects.
* Gather client data including financial constraints and goals.
* Prepare client financial plans and documents, ensuring compliance and objectives are met.
* Work with clients to ensure action items are thoroughly executed.
* Run ad hoc reports using Orion, Holistiplan, and Morningstar Advisor Workstation.
* Ensure an exceptional client experience.
* Help with strategic operational projects.
* Help present in marketing webinars and seminars.
* Help write blog articles for the firm website.

**Requirements:**

* BA/BS degree required, preferably in Personal Financial Planning.
* CFP® Candidate or has satisfied coursework requirement with intent to take CFP® exam in next few months.
* Very organized and keen attention to detail.
* Excellent written and oral communication skills.
* 1-2 years of experience in financial services preferred; some general office experience required.
* Experience with a financial services CRM preferred, strong Excel skills, and familiarity with financial planning software.
* Able to work under pressure and meet deadlines in a fast-paced, demanding environment.

**Compensation & Benefits:**
Competitive compensation, bonus, and full benefits package.

**Location:**

Houston, Texas. This is an on-site position with the flexibility to work remotely 1 day per week once training period is complete.

**Apply**:

Send resume and cover letter to Careers@GessnerWealthStrategies.com. A video cover letter is also welcome.