Associate Financial Planner

We are an independent fee-only Wealth Management firm in Walnut Creek, CA (the San Francisco Bay Area) seeking an Associate Financial Planner to join our team. We provide comprehensive, holistic, financial planning and investment management services for individuals, families, and business owners.

Position Overview

This is a professional position that will assist in the creation of complex and comprehensive financial recommendations. You will be involved in the entire client engagement and will be encouraged to grow into a Senior Planner role. To be successful, you must have the ability to utilize critical thinking skills, work independently and anticipate firm needs and client questions.

The Ideal Candidate will naturally…

…Connect with Others
The ideal candidate is someone with whom others feel comfortable opening up and sharing personal facts and feelings.

…Analyze Facts and Feelings
The ideal candidate is not only comfortable with analyzing numbers but also with reading body language and tones in a person's voice.

…Deliver Logic with Compassion
The ideal candidate has a highly logical mind but understands that objective advice is more effective when it's not delivered coldly.

…Inquire and Improve
The ideal candidate has an innate need to improve processes but understands that can only be done after first understanding how exactly things are currently done and why.

…Crave Learning
While there will be significant direction, mentoring and support from the firm, the ideal candidate is naturally curious and enjoys constantly learning and researching independently.

Details of Initial Responsibilities

- Participate in client meetings
- Collect, organize, and synthesize personal and financial client information
- Assist in analysis of financial planning needs
- Create deliverables for client engagements
- Continuously monitor clients' financial situations with detail and accuracy
- Be available to field ad hoc planning questions from clients
- Conduct research projects for the company and its clients
- Assist with internal work flow system upgrades and development
- Participate in company meetings and have involvement in company-wide decisions
- Complete existing projects and create new ones where opportunities exist

JWHARRISON
FINANCIAL ADVISORS

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Key Qualifications

- Strong logical mind (e.g., enjoy puzzles and skilled at deductive and inductive reasoning)
- Organized, with a strong attention to detail
- Demonstrated academic achievement (e.g., high GPA, high Standardized Test scores)
- Strong interpersonal skills
- Demonstrated passion for helping others
- Demonstrated personal financial management responsibility (i.e., responsible with own finances)
- Meaningful experience with the following is not required, but a plus:
    - Pivot tables and other advanced functions in Excel
    - MoneyGuidePro, Morningstar Office, or any other financial planning-related software
    - Teaching and mentoring
    - Written communication (e.g., reporting or blogging)

Our Services

Every individual can benefit from some level of financial advice, planning or management help. While some clients need broad and ongoing financial planning and management, for others a few hours of advice on a specific topic may be enough. For that reason, we work with clients under one of three arrangements:

- Ongoing Financial Advice and Money Management (AUM model) – ongoing asset management, comprehensive financial planning, and advice year-around on any financial-related topics.
- Hourly Advice & Comprehensive Financial Plans – financial consultations and/or customized financial plans that clients implement themselves.

Benefits

- Competitive salary with bonus incentive structure
- 401(k) with 6% employer matching contributions
- Health, dental, and vision insurance available
- Continuing Education – paid professional dues, conference attendance, training budget, etc.
- Mentorship and learning opportunities in a collaborative team environment
- Significant career growth opportunity with ability to define & tailor role within the organization

To apply, please email Bryan Hasling (bryan@jwharrison.com) and include:

- Your resume and cover letter, as well any attachments or links that may help us learn more about you (e.g. LinkedIn, publications, blogs, etc.)