

Houston, TX

Associate Financial Planner

RECRUITER



Jesse Lineberry, CFP®

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INTERESTED?

Apply here:

<https://bit.ly/3rEZoIV>



NEW PLANNER RECRUITING

We are a national recruiting firm specializing in placing financial planning professionals with leading wealth management firms nationwide. We are representing a growing financial planning firm in Houston, TX. Detailed job specifications available once we connect and agree it is a mutual fit.



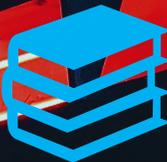
GROWING, BOUTIQUE, FEE-ONLY RIA.

Our client is a rapidly growing financial planning firm in Houston that is committed to understanding their client's money and life. This is a small team determined to make a big impact on their clients. Leveraging best in class technology, refined processes, and a growth-oriented approach, you'll have everything you need to grow into a lead advisor. If you're a self-starting, detail-oriented, strategic thinker with a passion for serving clients, this is the role you've been looking for.



RESPONSIBILITIES WE'LL TRUST YOU WITH

Support the firm's principal in delivering high quality financial planning advice. Attend client meetings and take detailed notes, eventually participating in and leading client meetings. Build financial plans, assist with meeting preparation, and facilitate the implementation of financial planning advice. Assist with any operations or investment management tasks that need to be completed. Participate in screening and on-boarding prospects and new clients. Assist with the implementation and refinement of the firm's technology. Eventually participate in setting the strategic vision of the firm.



QUALIFICATIONS

Bachelors' degree from an accredited, CFP Board Registered financial planning program or intense, quantitative field. 1-3 years of financial planning experience. CFP® or passage of the exam are preferred. Experience observing or participating in financial planning meetings is also preferred. Strong attention to detail is required. The ideal candidate will think like an owner, demonstrate accountability, and seek growth-oriented feedback.



THE PERKS

Competitive salary based on experience. 401(k) with match. Subsidized medical insurance. Opportunity to grow within a firm committed to developing you into a lead advisor.