

## Associate Financial Planner

### RECRUITER



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### Interested?

Apply here:

<https://bit.ly/32cADzR>



### 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 well-established fee-only firm in Houston, TX that is seeking an Associate Financial Planner to join their team. Detailed job specifications available once we connect and agree it is a mutual fit.



### GROWING, ENTREPRENEURIAL, FEE-ONLY RIA

Our client is an independent boutique investment and financial planning firm that cultivates peace of mind through their comprehensive approach. This is the perfect opportunity for someone who is enthusiastic about helping people make the most meaningful use of their personal and financial resources in a fiduciary capacity. If you are seeking a one-on-one hyper mentoring relationship from the firm's founder and senior planner, this is the firm, for you.



### RESPONSIBILITIES WE'LL TRUST YOU WITH

Collect, organize and analyze client information. Strategize, construct and present financial plans to the advisory team and clients. Support the firm owner in a multitude of client service and advisory functions. Create deliverables for client meetings and coordinate planning concepts with outside professionals. Serve as the go-to source on the team for ad hoc planning questions. Assist with trading. Assist with developing and refining internal workflows. Contribute to the firm's culture of business development and client education.



### QUALIFICATIONS

Bachelors' degree from an accredited university; major in financial planning preferred. Making progress towards the CFP® designation preferred. Have a demonstrated affinity for helping others and passion about the financial planning profession. Can identify and meet client and teammate needs and requirements on time. Must be a self-starter with a passion for delivering exceptional client-centered service. Desire to want to learn and contribute to all aspects of taking the firm to the next level. Consistently wonder how you can make a positive lasting difference in someone's life.



### THE PERKS

Competitive salary based on experience. Performance-based pay program and career track. Health and 401k, with annual safe-harbor employer contribution. Educational reimbursements (continued education, conference attendance, training budget, etc.) and paid professional dues. Working alongside firm owner to share input and shape the direction of the firm.